



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

SBO1006-EN

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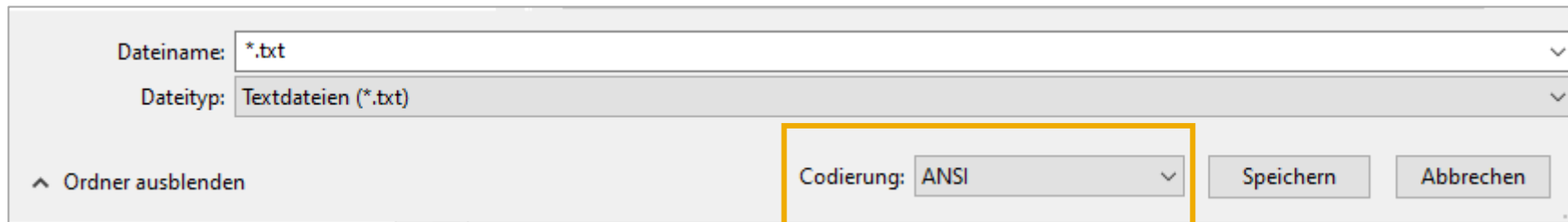
- Data import of business partner master
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- Data import of business partner catalog numbers
- Create Bill of Materials by copying from Excel
- Maintain price list by copying from Excel

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**



The screenshot shows a dialog box for data import. It has two dropdown menus: 'Dateiname:' with the value '*.txt' and 'Dateityp:' with the value 'Textdateien (*.txt)'. Below these is a 'Codierung:' dropdown menu with the value 'ANSI', which is highlighted with a yellow rectangular box. To the left of the 'Codierung:' dropdown is a link icon and the text 'Ordner ausblenden'. To the right are two buttons: 'Speichern' and 'Abbrechen'.

- TXT files must be closed before importing
- TXT files may only contain data to be imported and no header line nor blank lines!
- 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 length 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

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

A	B	C	D	E	F
BP Code	BP Type	BP Name	Telephone 1	E-Mail	Web Site
200000	S	conesprit GmbH	07191 18 70 190	info@conesprit.de	www.business-one-consulting.com
200001	S	SAP AB	0800 5 34 34 24	info.germany@sap.com	www.sap.com/germany/index.html

*Import.txt - Editor
 Datei Bearbeiten Format Ansicht Hilfe
 200000 S conesprit GmbH 07191 18 70 190 info@conesprit.de www.business-one-consulting.com
 200001 S SAP AB 0800 5 34 34 24 info.germany@sap.com www.sap.com/germany/index.html

Import from Excel

Data Type to Import: Business Partner **3**

File to Import: Import.txt **4**

Map the File Columns to the Object Fields Display Database Field Name

Column in File	Field in Object
A	BP Code
B	BP Type
C	BP Name
D	Telephone 1
E	E-Mail
F	Web Site 5
G	
H	
I	
J	
K	
L	
M	

Import Method

Add New Records and Update Existing Records **6**

Add New Records Without Updating Existing Records

Update Existing Records Without Adding New Records

Create New BP Groups During Import, If None Exist

Mapping

Use Data Template

Save as Template **7**

Clear Mapping

Import **8**

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

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

	A	B	C	D	E	F	G	H
1	Item No.	Item Description	Item Type	Item Group	Purchase Item	Sales Item	Inventory Item	
2	Ex0201	Carrier	I	Item	Y	Y	Y	
3	EX0202	Ledge	I	Item	Y	Y	Y	
4	Ex0203	Screw	I	Item	Y	Y	Y	
5	Ex0204	Bolt	I	Item	N	Y	Y	
6	Ex0205	Bar	I	Item	N	Y	N	
7	Ex0206	Screw nut	I	Item	N	Y	N	
8	Ex0207	Lock	I	Item	N	Y	N	
9	Ex0208	Handle	I	Item	N	Y	N	
10								

*Items.txt - Editor

Datei	Bearbeiten	Format	Ansicht	Hilfe
Ex0201	Carrier	I	Item	Y Y Y
EX0202	Ledge	I	Item	Y Y Y
Ex0203	Screw	I	Item	Y Y Y
Ex0204	Bolt	I	Item	N Y Y
Ex0205	Bar	I	Item	N Y N
Ex0206	Screw nut	I	Item	N Y N
Ex0207	Lock	I	Item	N Y N
Ex0208	Handle	I	Item	N Y N

Import from Excel

Data Type to Import: **Items** (3)

File to Import: **Items.txt** (4)

Map the File Columns to the Object Fields Display Database Field Name

Column in File	Field in Object
A	Item No.
B	Item Description
C	Item Type
D	Item Group
E	Purchase Item
F	Sales Item
G	Inventory Item
H	
I	
J	
K	
L	
M	

Import Method (5):

- Add New Records and Update Existing Records (6)
- Add New Records Without Updating Existing Records
- Update Existing Records Without Adding New Records
- Create New Item Groups, Manufacturers and Preferred Vendors During Import, If None Exist

Mapping (7):

Use Data Template:

Save as Template (7)

Clear Mapping

Import (8)

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

Field description:	BP Code	BP Catalog Number
Item No.		
1		
2	A00001	V10000
3	A00002	V10000
4	A00003	V10000
5	A00004	V10000
6	A00005	V10000
7	A00001	V20000
8	A00002	V20000
9	A00003	V20000
10		

Datei	Bearbeiten	Format	Ansicht
A00001	V10000	123451	
A00002	V10000	123452	
A00003	V10000	123453	
A00004	V10000	123454	
A00005	V10000	123455	
A00001	V20000	10001	
A00002	V20000	10002	
A00003	V20000	10003	

Import from Excel

Data Type to Import: Business Partner Catalog Numbers

File to Import: Import.txt

Map the File Columns to the Object Fields

Column in File	Field in Object
A	Item No.
B	BP Code
C	BP Catalog Number
D	
E	
F	
G	
H	
I	
J	
K	
L	
M	

Note that only one import method is supported:
Add New Records Without Updating Existing Records

Mapping
Use Data Template

Save as Template

Clear Mapping

Import Cancel

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

Bill of Materials

Product No. → A100 **2** Quantity 1

Product Description Assembly

BOM Type Production

Production Std Cost 0,00 EUR

Planned Average Production Size 1,00

Warehouse → 01

Price List Basis Preisliste

Distr. Rule

Project

#	Type	No.	Description	Quantity	UoM Name	Warehouse	Issue Method	Product Price
1	Item							0,00 E

4

Bill of Materials

Product No. → A100 X Quantity 1

Product Description Assembly

BOM Type Production

Production Std Cost 0,00 EUR

Planned Average Production Size 1,00

Warehouse → 01

Price List Basis Preisliste

Distr. Rule

Project

#	Type	No.	Description	Quantity	UoM Name	Warehouse	Issue Method	Product Price
1	Item	→ C001	Component 1	3		→ 01	Manual	0,00 E
2	Item	→ C002	Component 2	4		→ 01	Manual	0,00 E
3	Item	→ C003	Component 3	1		→ 01	Manual	0,00 E
4	Item							0,00 E

1

5

6

Add Cancel

Product Price 100,00 EUR

F4

Manual

	A	B	C	D	E	F
1	No.	Description	Quantity	UoM Name	Warehouse	Issue Method
2	C001		3		01	Manual
3	C002		4		01	Manual
4	C003		1		01	Manual
5						
6						
7						
8						
9						
10						
11						
12						
13						
14						
15						

3

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

Inventory > Price Lists > Price Lists

Inventory > Price Lists > Price Lists

Find: Price Mode: Net

#	Item No.	Item Description	Base Price List	Factor	Base Price	Price	Manual	Inventory UoM	Pricing Unit
1	100000	Schulung	Basis Preisliste	1	361,34 EUR	361,34 EUR	<input type="checkbox"/>	Manuell	Manuell
2	100001	Starterse	Basis Preisliste	1			<input type="checkbox"/>	Manuell	Manuell
3	A00001	J.B. Multifunktionsdrucker 1420	Basis Preisliste	1	110,00 EUR	110,00 EUR	<input type="checkbox"/>	Manuell	Manuell
4	A00002	J.B. Multifunktionsdrucker 1111	Basis Preisliste	1	90,00 EUR	90,00 EUR	<input type="checkbox"/>	Manuell	Manuell
5	A00003	J.B. Multifunktionsdrucker 1186	Basis Preisliste	1	95,00 EUR	95,00 EUR	<input type="checkbox"/>	Manuell	Manuell

G10 100,00 EUR

#	Item No.	Item Description	Base Price List	Factor	Primary Currency - Base Price	Primary Currency - Price	Primary Currency	Inventory UoM	Pricing Unit
1	100000	Schulung	Basis Preisliste	1	361,34 EUR			Manuell	Manuell
2	100001	Starterset	Basis Preisliste	1				Manuell	Manuell
3	A00001	J.B. Multifunktionsdrucker 1420	Basis Preisliste	1	110,00 EUR			Manuell	Manuell
4	A00002	J.B. Multifunktionsdrucker 1111	Basis Preisliste	1	90,00 EUR			Manuell	Manuell
5	A00003	J.B. Multifunktionsdrucker 1186	Basis Preisliste	1	95,00 EUR			Manuell	Manuell
6	A00004	Rainbow Farbdruker 5.0	Basis Preisliste	1	75,00 EUR			Manuell	Manuell
7	A00005	Rainbow Farbdruker 7.5	Basis Preisliste	1	85,00 EUR			Manuell	Manuell
8	A00006	Rainbow 120 Laserdrucker	Basis Preisliste	1	105,00 EUR			Manuell	Manuell

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

Basis Preisliste

Suchen: Preismodus: Brutto

#	Artikelnr.	Artikelbeschreibung	Basispreisliste	Faktor	Basispreis	Preis	Manuell	BestandsME	Preiseinheit
1	100000	Zahnbleaching	Basis Preisliste	1		400,00 EUR	<input type="checkbox"/>	Manuell	Manuell
2	100001	Starterset Zahn Bleaching	Basis Preisliste	1		50,00 EUR	<input type="checkbox"/>	Manuell	Manuell
3	A00001	J.B. Multifunktionsdrucker 1420	Basis Preisliste	1		120,00 EUR	<input type="checkbox"/>	Manuell	Manuell
4	A00002	J.B. Multifunktionsdrucker 1111	Basis Preisliste	1		100,00 EUR	<input type="checkbox"/>	Manuell	Manuell
5	A00003	J.B. Multifunktionsdrucker 1186	Basis Preisliste	1		90,00 EUR	<input type="checkbox"/>	Manuell	Manuell
6	A00004	Rainbow Farbdruker 5.0	Basis Preisliste	1		80,00 EUR	<input type="checkbox"/>	Manuell	Manuell
7	A00005	Rainbow Farbdruker 7.5	Basis Preisliste	1		99,00 EUR	<input type="checkbox"/>	Manuell	Manuell
8	A00006	Rainbow 120 Laserdrucker	Basis Preisliste	1		108,00 EUR	<input type="checkbox"/>	Manuell	Manuell

Aktualisieren Abbrechen Löschen Auswahlkriterien



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