

Importing - Sales Order Easy

Last Modified on 03/30/2026 9:06 pm EDT

Importing - Sales Order Easy

Purpose:

This import allows a user to import to create the header of a Sales Order or multiple Sales Orders all at once.

Required Fields:

- New Records: Customer PO, Customer, Ship To, Item, qty
- Existing Records: N/A

Mapping Tips:

- The Customer PO is the record identifier. So if trying to use this import to create multiple Sales Orders make sure each Sales Order is separated by Customer PO
- Because Customer PO is the record Identifier you should have the preference turned on to prevent duplicate Customer POs to help eliminate mistakes