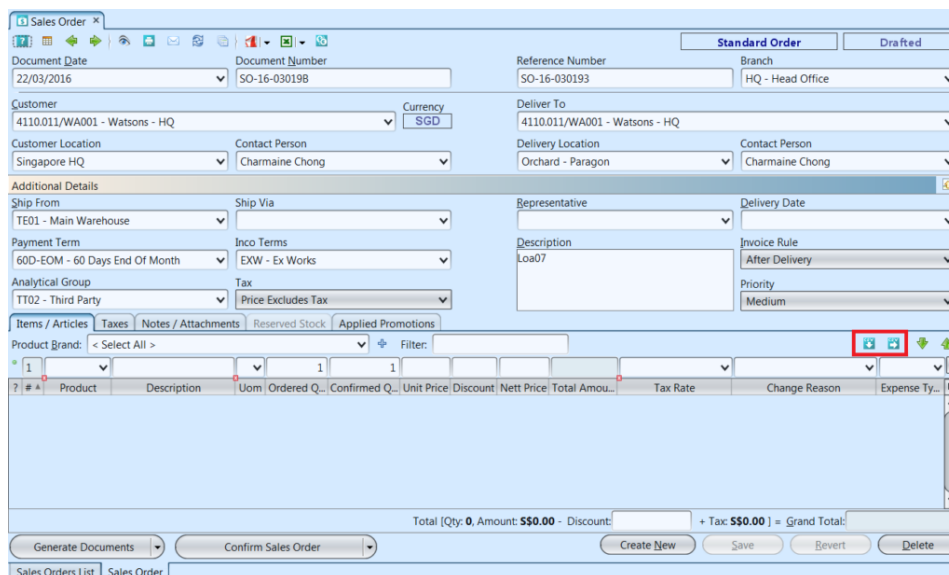# How to Export or Import Data?

At many places within Samooha application, user will see these 2 buttons [icon] [icon] which indicate that user is able to import / export data from / to CSV (comma-separated values) file for that document view. Data in CSV file can be viewed using Excel or Notepad program.

[icon] Export data to CSV file

[icon] Import data from CSV file

For example, in Sales Order view, user is able to export list of products in the sales order or import list of products to be part of the sales order
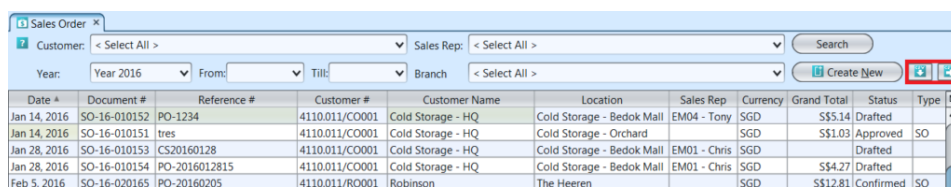

Example of Export & Import in Sales Order

There are 2 types of export & import feature for Sales Order in Samooha:

A. Document level

B. Product line level

Note: user is recommended to export data to a CSV file first and then use the exported file as import file template. For mandatory fields, please ensure these are filled up and according to the format of the field (i.e. text, numbers, date, etc)

Click on *"Sales Orders List"* tab at the bottom of screen. At the top right of screen there are 2 buttons; ➡ button to export approved Sales Order documents as CSV file, while ⬇ button to import CSV file into Samooha as drafted Sales Order documents.
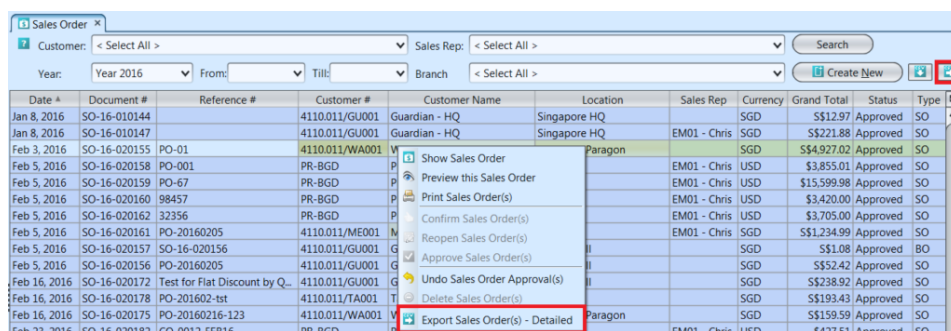

I. Export Sales Order to CSV File:

1. To export sales order, select approved Sales Order document row(s) from the list, then click ➡ button, or right-click on the Sales Order row to show options window then click on "Export Sales Order(s) – Detailed". User can select multiple rows to export multiple Sales Order documents in a single CSV file

Note: only approved Sales Order can be exported

2. On the "Export File Chooser" window, click on "*Browse*" button to select file location and file name to save the exported data. User may select different format of the data to be exported:

- Header and Lines

- One Row per Item

- With Quantity Only (for sending data to 3PL)

3. Click **OK** button to confirm and export the selected Sales Order document(s) to CSV file.

4. Open the folder where the file was saved. Below is example of the same Sales Order document exported as CSV file in different formats:

- Header and Lines

	A	B	C	D	E	F	G	H	I	J	K	L	M
Type	Doc #	Date	Ref #	Customer	Customer	Currency	Sales Rep	Warehous	Partner Lo	Delivery Lc	Description	
	Product Code	Product Name	UOM	Ordered Q	Quantity	Unit Price	Discount	Total Amo	Tax		Account Setting	
SalesOrde	SO-16-010150	14/01/2016	SO-15-120	4110.011/	Guardian -	SGD		TE01		Singapore	Singapore	test SPD-049
	Loa10		LOACKER CHO	Ct12	1	1	47.88	0	47.88	SR		
	Loa10		LOACKER CHO	Each	15	15	3.99	0	59.85	SR		
		Total Quantity	Total Amo	Discount A	Tax Total	Grand Total						
		16	107.73	0	7.54	115.27						

- One Row per Item

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V
Type	Doc #	Date	Ref #	Customer	Customer	Currency	Sales Rep	Warehous	Customer	Delivery L	Product C	Product N	UOM	Ordered C	Quantity	Unit Price	Discount	Total Amo	Tax		Account S	Description
SalesOrde	SO-16-01(	14/01/2016	SO-15-12(	4110.011/	Guardian	SGD		TE01		Singapore	Singapore	Loa10	Loacker C	Ct12	1	1	47.88	0	47.88	SR			test SPD-049
SalesOrde	SO-16-01(	14/01/2016	SO-15-12(	4110.011/	Guardian	SGD		TE01		Singapore	Singapore	Loa10	Loacker C	Each	15	15	3.99	0	59.85	SR			test SPD-049

- With Quantity Only (for sending data to 3PL)

A	B	C	D	E	F
SO|SO|1|SO-15-120118|14012016000000|SO-15-120118|4110.011/GU001|4110.011/GU001|Guardian - HQ|One Raffles Place	#30-02	Tower One|||SG|048616|SG|SGD|TE01|			
SOD|1|2|Loa10|1|1					
SOD|1|3|Loa10|15|2					

II. Import Sales Order from CSV File:

1. To import sales order, click ⬇ button in the Sales
Order list view. User can import multiple Sales Order
documents in a single CSV file. Sales Order document
will be imported into Samooha as drafted in status.

Note: user to ensure there is no duplicate document
number for the imported data, i.e. the document
number is not already in Samooha list of Sales Order

2. On the "Import File Chooser" window, click on
"*Browse*" button to select file location and file name
to load the import data from. User to select the
correct format of the data to be imported:

   ▪ Header and Lines

   ▪ One Row per Item

Import File Chooser
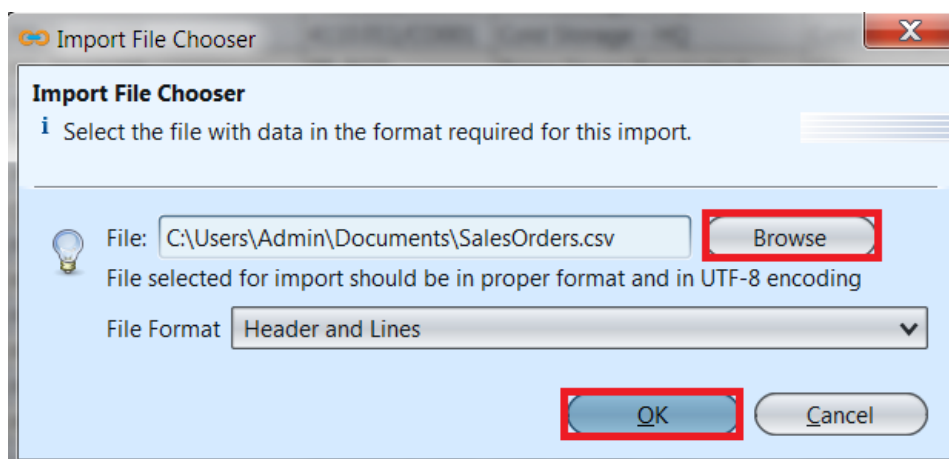
Import File Chooser

i Select the file with data in the format required for this import.

File: C:\Users\Admin\Documents\SalesOrders.csv   (Browse)

File selected for import should be in proper format and in UTF-8 encoding

File Format Header and Lines ▾

Header and Lines
One Row per Item

Below is example of the same multiple Sales Order documents (with different document numbers), imported as CSV file in different formats:

- Header and Lines

	A	B	C	D	E	F	G	H	I	J	K	L	M
	Type	Doc #	Date	Ref #	Customer	Customer	Currency	Sales Rep	Warehous	Partner Lo	Delivery Lo	Description
		Product Code	Product Name	UOM	Ordered Q	Quantity	Unit Price	Discount	Total Amo	Tax		Account Setting
	SalesOrde	SO-16-030188h	11/03/2016	test chang	4110.011/	Robinson	SGD		EM04	TE01		The Heere	The Heeren
		BD01-003145	Ctrl-A Beauty	Each	52	50	25.12	3%	1,218.50	SR		
			Total Quantity	Total Amo	Discount A	Tax Total	Grand Total					
			50	1,218.50	0	85.3	1,303.80					
	SalesOrde	SO-16-030191h	15/03/2016	test ADX2(	4110.011/	Watsons -	SGD			TE01		Singapore	Orchard - I	test ADX2016-02 promo
		Loa07	LOACKER DAR	Ct150	2	2	144	0	288	SR		
		Loa08	LOACKER CHC	Each	7	7	3.99	0	27.93	SR		
		Loa09	LOACKER MIX	Each	10	10	4.8	0	48	SR		
		Loa10	LOACKER CHC	Each	19	19	3.99	0	75.81	SR		
			Total Quantity	Total Amo	Discount A	Tax Total	Grand Total					
			38	439.74	0	29.77	455.11					

- One Row per Item

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V
	Type	Doc #	Date	Ref #	Customer	Customer	Currency	Sales Rep	Warehous	Customer	Delivery L	Product C	Product N	UOM	Ordered C	Quantity	Unit Price	Discount	Total Amo	Tax	Account S	Description
	SalesOrde	SO-16-030188r	11/03/2016	test chang	4110.011/	Robinson	SGD	EM04		TE01		The Heere	The Heere	BD01-003	Ctrl-A Bea	Each	52	50	25.1214	0	1218.5	SR	
	SalesOrde	SO-16-030191r	15/03/2016	test ADX2	4110.011/	Watsons -	SGD			TE01		Singapore	Orchard -	Loa07	LOACKER	Ct150	2	2	144	0	288	SR	test ADX2016-
	SalesOrde	SO-16-030191r	15/03/2016	test ADX2	4110.011/	Watsons -	SGD			TE01		Singapore	Orchard -	Loa08	LOACKER	Each	7	7	3.99	0	27.93	SR	test ADX2016-
	SalesOrde	SO-16-030191r	15/03/2016	test ADX2	4110.011/	Watsons -	SGD			TE01		Singapore	Orchard -	Loa09	LOACKER	Each	10	10	4.8	0	48	SR	test ADX2016-
	SalesOrde	SO-16-030191r	15/03/2016	test ADX2	4110.011/	Watsons -	SGD			TE01		Singapore	Orchard -	Loa10	LOACKER	Each	19	19	3.99	0	75.81	SR	test ADX2016-

3. Click **OK** button to confirm and import the selected CSV file as Sales Order document(s).

4. Click **Search** button on top right of the list view to refresh the list. If successfully imported, the document(s) status will be shown as drafted.

In Sales Order view, user is able to export list of products in the sales order or import list of products to be part of the sales order.

I. Export Sales Order Product Lines Data to CSV File:

Scenario: Export list of products data from a sales order document to csv file

1. Open **"Sales – (Sell In Transactions) Sales Orders"** view

2. Double click on a sales order from the sales orders list, it will bring up the details on **"Sales Order"** tab for the selected order.

3. On right side of **"Items / Articles"** tab, click on button to export the list of products to csv file. It will pop up a window, select folder to save and enter the file name of the csv data file. Default file name is document#.csv

	A	B	C	D	E	F	G	H	I
	[Product #]	[Product Name]	[UOM]	[Quantity]	[Unit Price]	[Discount]	[Nett Price]	[Amount]	[Tax Code]
	BD02-002131	Mint Tea Shower Gel 250ml	Each	10	13.98		13.98	139.8	SR
	BD02-002130	Jasmine Shower Gel 250ml	Each	10	13.98		13.98	139.8	SR
	BD04-002562	Master Eye Liner in Brown	Each	10	8.2		8.2	82	SR
	BD03-002457	365 Cellular Elixir Intense Youth	Each	10	63.55		63.55	635.5	SR

*Note: User may need to change numbers (e.g. **"Product #"**, **"Barcode"**) as text type in the excel application, for it to show properly. This is due to excel application displaying long numbers as scientific notation (e.g. 1.2408E+12). For code numbers that starts with zero(s), excel may truncate / remove the zero(s).

To change data type in excel, select the column, right click, Format cells, select Text category

II. Import Sales Order Product Lines Data from CSV File:

**Scenario:** Import list of products data into a sales order document from csv file

Note: User is recommended to export data first to create a data template with example to use as data import creation template. This will help reduce likelihood of mistakes in preparing the data to be imported into GOOMI application

1. Open **"Sales – (Sell In Transactions) Sales**

2. Double click on a sales order from the sales orders list, it will bring up the details on *"Sales Order"* tab for the selected order. User can only enter / import product lines data when the Sales Order document status is *"Drafted"*. If a sales order's status is *"Confirmed"* or*"Approved"*, reopen / undo approval of the Sales Order first. This is to allow user to modify the document

3. On right side of *"Items / Articles"* tab, click on 🔽 button to import the list of products from csv file. It will pop up a window, select folder to load and choose the csv file to *import the data from
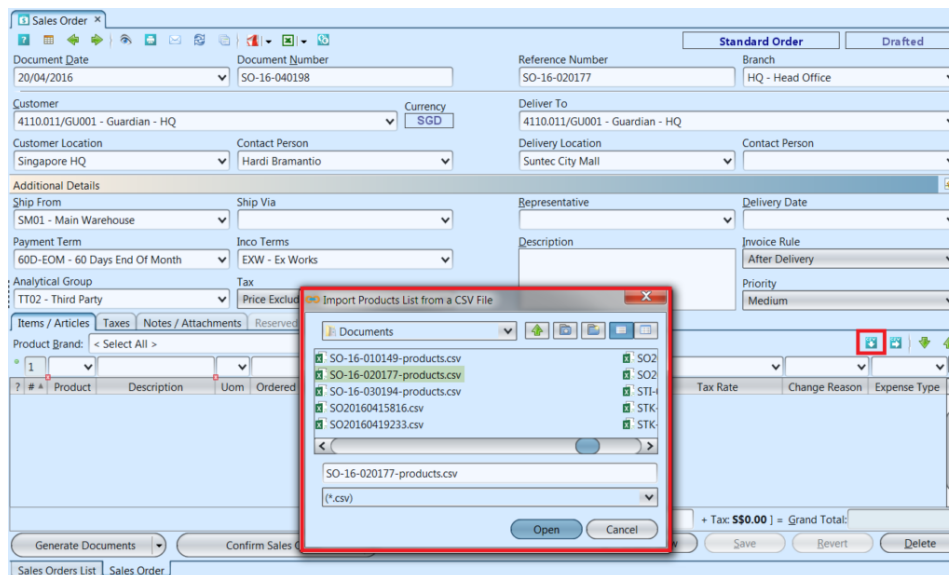
*Note: User may need to change numbers (e.g. *"Product #"*, *"Barcode"*) as text type in the excel application, for it to show properly. This is due to excel application displaying long numbers as scientific notation (e.g. $1.2408E+12$). For code numbers that starts with zero(s), excel may truncate / remove the zero(s).

To change data type in excel, select the column, right click, Format cells, select Text category

4. Compare the imported data in the sales order against the csv file

Product Brand: < Select All >   Filter:

?	#	Product	Description	Uom	Ordered Qty	Confirmed Qty	Unit Price	Discount	Nett Price	Total Amount	Tax Rate	Change Reason	Expense Type
	1	BD02-0...	Mint Tea Shower Gel ...	Each	10	10	S$13.98		S$13.98	S$139.80	Sales Tax Account 7% SR		
	2	BD02-0...	Jasmine Shower Gel ...	Each	10	10	S$13.98		S$13.98	S$139.80	Sales Tax Account 7% SR		
	3	BD04-0...	Master Eye Liner in Br...	Each	10	10	S$8.20		S$8.20	S$82.00	Sales Tax Account 7% SR		
	4	BD03-0...	365 Cellular Elixir Inte...	Each	10	10	S$63.55		S$63.55	S$635.50	Sales Tax Account 7% SR		

Total [Qty: **40**, Amount: **S$997.10** - Discount: + Tax: **S$69.80**] = Grand Total: S$1,066.90

Generate Documents ▼   Confirm Sales Order ▼   Create New   Save   Revert   Delete

Sales Orders List | Sales Order

	A	B	C	D	E	F	G	H	I
	[Product #]	[Product Name]	[UOM]	[Quantity]	[Unit Price]	[Discount]	[Nett Price]	[Amount]	[Tax Code]
	BD02-002131	Mint Tea Shower Gel 250ml	Each	10	13.98		13.98	139.8	SR
	BD02-002130	Jasmine Shower Gel 250ml	Each	10	13.98		13.98	139.8	SR
	BD04-002562	Master Eye Liner in Brown	Each	10	8.2		8.2	82	SR
	BD03-002457	365 Cellular Elixir Intense Youth	Each	10	63.55		63.55	635.5	SR