Below are instructions on how to use the import file.

Good afternoon,

Here are some simple instructions on how to use the file as well.

Line Number - This is just the sequence that the lines of each item. Start with 1, 2, 3, etc.
Description- Type a detailed description of the item to be ordered
Part Number- This is the ISBN or Item Number
Unit- Set, Each, Pack, Box (enter whatever describes how the item is packaged)
Qty- Enter the # of each item you require
Unit Price- This is the price per item (not qty x unit price)
Tax- Enter 0 or leave blank (we are sales tax exempt)
Freight- Enter a dollar amount for the entire order in one of the fields or allocate an amount for each (if 0 shipping costs enter 0)
Account- You must enter the correct account number with the . between each series. You can view your account numbers in the dropdown when you enter a purchase req or under GL, Transaction Inquiry, Acct Detail, Hit Apply
(example 119.1059.10.5.000.000.1100.610.0000)
Item Number- enter a 0 here

Complete the import file with the information above. Save the file on your computer so you can locate it when you go to Import in iVisions. (Example: School Specialty Import)

Login to Workflow in iVisions
Purchasing & Payables
Purchasing
Control Panel
Click the Add to enter a new requisition
Enter the Vendor, Ship To (Choose 99 School Street), Requester (your position)
Change the By Date to a Date after 7/1/20
Actions
Import from Excel
Save File
Find the file saved on your computer

Highlight the file
Click Open
Upload

It will notify you if the upload was successful.

Please don't change the name of the tab on the bottom of the import sheet. It should say Sheet1. If it is renamed, it won't allow you to import.