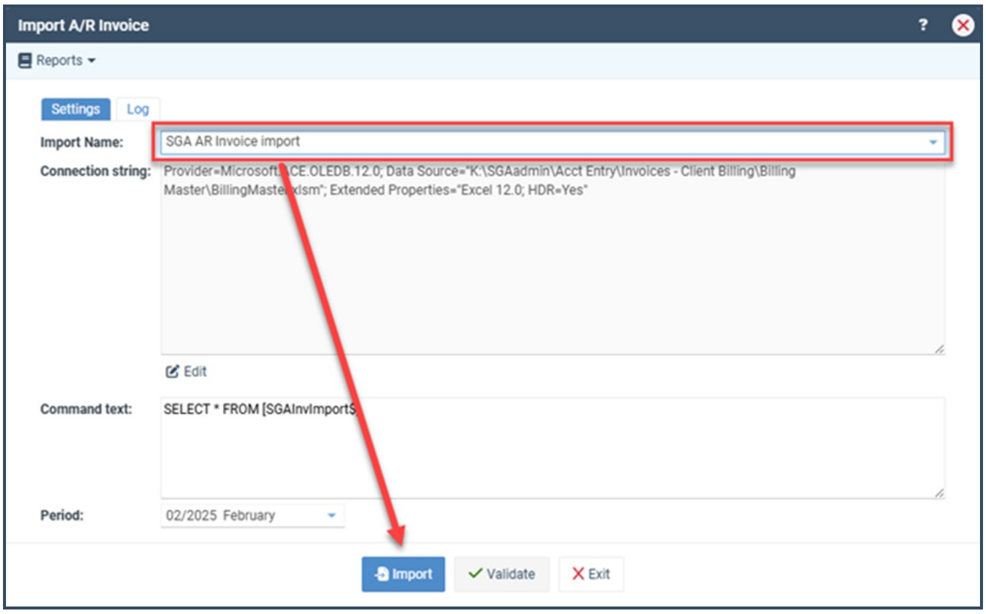
How To - Importing A/R Invoices

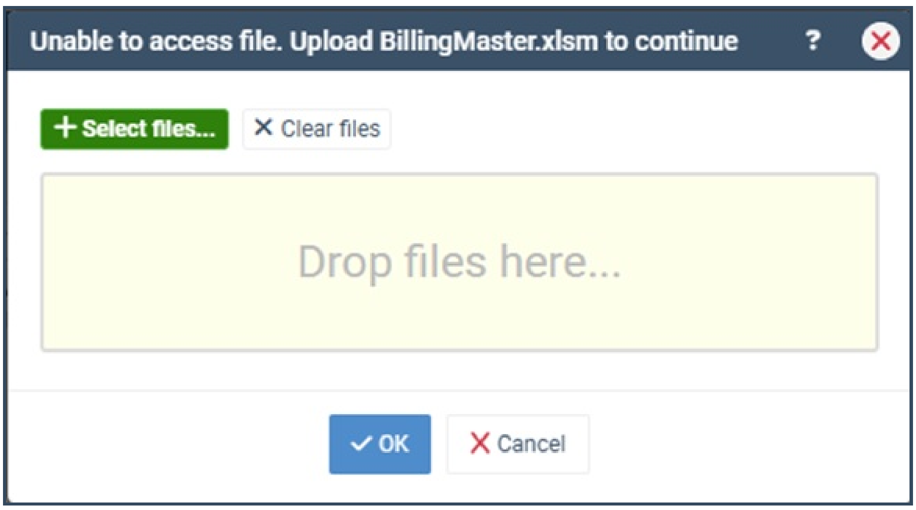
Last Modified on 10/31/2025 9:02 am EDT

How To – Importing A/R Invoices

1. *Daily > A/R Invoice Batch List >New drop-down menu > Import*
2. Choose your **Import Name** from the drop-down menu options. This will automatically populate the Connection String and Command Text fields (as defined in *Settings > Accounts Receivable > A/R Invoice Imports*).
3. Select the **Period**.
4. Click **Import**.

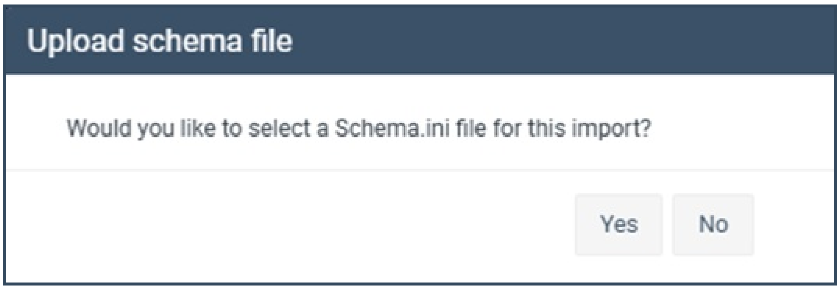


5. **Select** your file or **Drag and Drop** your file into the box.



6. Once your file is selected, click **OK**.

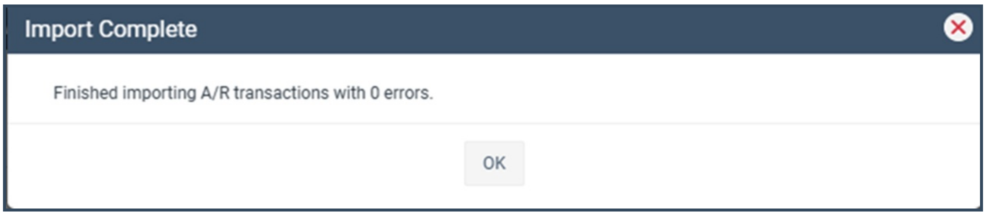
7. If the **"Use Schema"** box is checked within the setup of the Import Name (as defined within *Settings > Accounts Receivable > A/R Invoice Imports)*, then you may be asked if you **would like to select a Schema**.



NOTE: *An import schema is used to define the name and type of each item being imported. A schema is only needed in some cases, and SGA can assist you if that situation occurs.*

If you have a Schema that was set up by SGA, choose **YES**, select that file, and the import will complete. If you do not, you will choose NO, and the import will proceed then.

8. The **Import Complete** message will display once the import is complete with no errors.



9. You may **Import** additional files, or once all the files have been imported, you may **Exit** the screen.