IMPORTING ELECTRONIC LIST INTO THE MATERIALS LIBRARY

A Materials list on an MS Excel spreadsheet can be imported into the Materials Library. From the upper menu select >Record>Import List to start the import wizard. The data in the spreadsheet must be held in strict column order (and with no header row) as specified below:

Column	Data
A	Description
B	Code
C	Unit
D	Rate
E	Pack size

You will be invited to specify the Category and Supplier for the data. If these are left blank the data will simply be added into the library even when similar data is already present. However, if the wizard finds an exact match of Description, Code, Category and Supplier in the library then these matched records will be updated. Note that discount and waste percentages are not overwritten by the update.
All records have a date stamp indicating when they were created and last modified. Note that the creation date will be the date of upgrade from Liberate Edition 2 to Edition 3 and NOT the date of entry into the Edition 2 library.

From this dialog box you will be asked to select a supplier and a category.
Unlike saving from the Items screen you cannot create categories and suppliers here. These must be pre-created at from the Library Admin menu as follows
Supplier : Library admin> View > Suppliers
Category: Library admin> Record> Categories

If these items did not exist previously, they will now appear on the drop down list.

Tip
Take some time to organise your descriptions on the spreadsheet
Example
If you have received a supplier list as such.

X4z16P 150 x 50

You may wish to amend this to something a bit friendlier such as
Timber prepared 150 x 25
You can use the code in the code column for searches and automatic updates of your materials lists

Notes on Electronic Import
Liberate will only find information in the front Excel tab
Liberate will only look in the columns shown above
Liberate will not recognise any characters in the numeric (quantity or price columns except numbers and decimal points

Notes
In order to prevent duplication, you cannot save the exact same resource to the library twice. You will get an error message warning that this is being attempted.
You can create an identical resource and save it to the library once the resource has been disconnected first. The library will tell you that a resource of that name already exists and give you options to connect to

the original resource or save as a new resource. You can choose to Include Near Matches for the description of the resource.

Choose the appropriate option. You may wish to have the same resource in the library at different prices or with minor variations.