

Compeat Help

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Import Journal Entries

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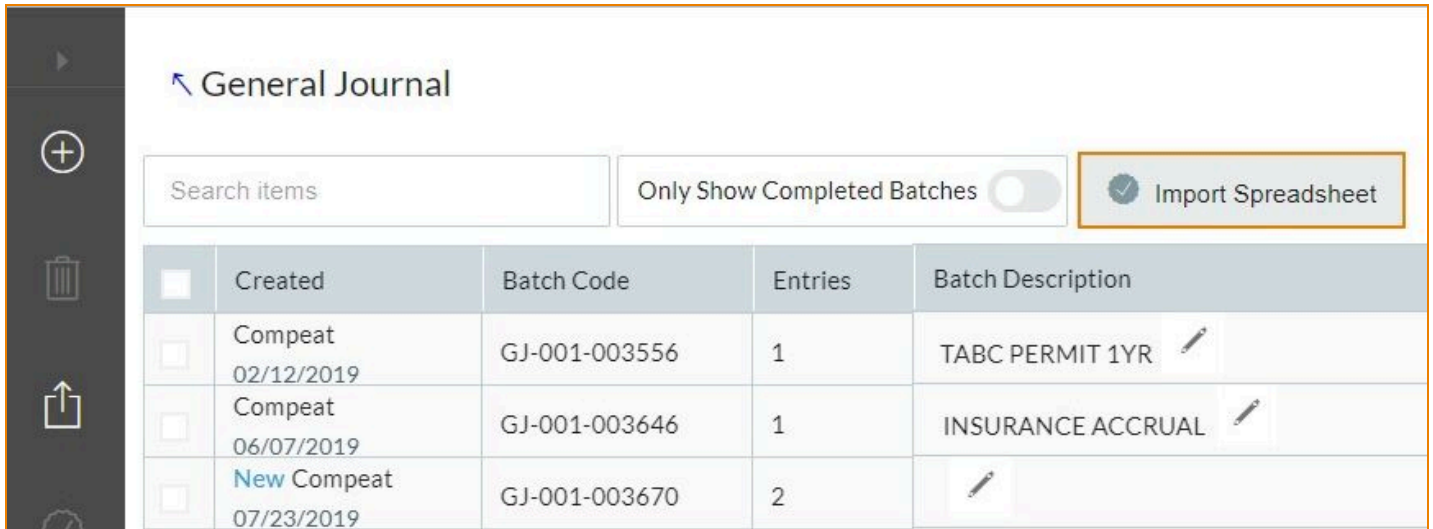
Quickly create general journals by importing entries using a spreadsheet or template.

Importing journal entries can be especially useful for bringing in transactions from third-party payroll providers and depreciation.




Both import options live in our General Journals feature which you can access by navigating to **Journal Entries > General Journal**.

Import from Spreadsheet

To import a spreadsheet, select the **Import Spreadsheet** button located above the main General Journal listing.



The screenshot shows the 'General Journal' interface. At the top, there is a search bar labeled 'Search items' and a toggle switch for 'Only Show Completed Batches'. The 'Import Spreadsheet' button is highlighted with a red border. Below these elements is a table with the following data:

	Created	Batch Code	Entries	Batch Description
<input type="checkbox"/>	Compeat 02/12/2019	GJ-001-003556	1	TABC PERMIT 1YR 
<input type="checkbox"/>	Compeat 06/07/2019	GJ-001-003646	1	INSURANCE ACCRUAL 
<input type="checkbox"/>	New Compeat 07/23/2019	GJ-001-003670	2	

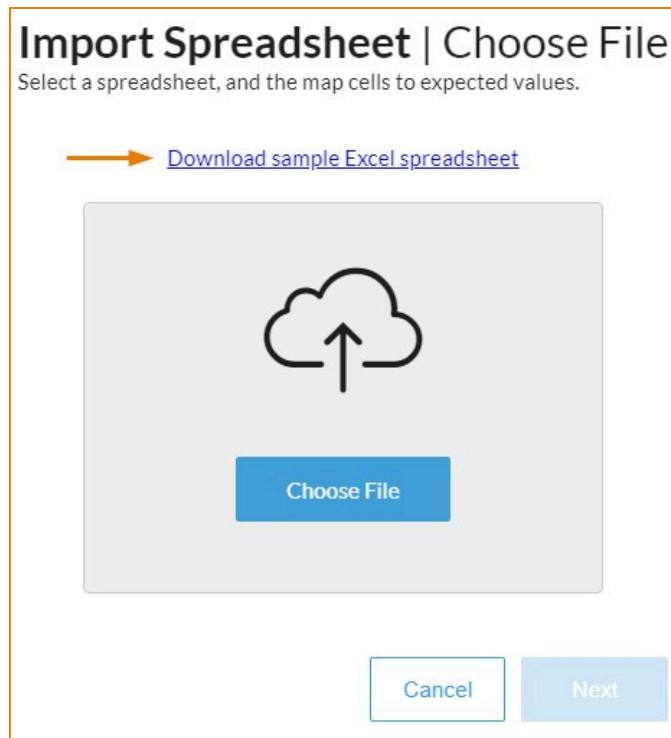
When it comes to spreadsheets, you have two options: download and use Compeat's sample spreadsheet or build your own.

Use Compeat's Sample Spreadsheet

Compeat provides a sample spreadsheet that you can download and use for the import process. We have formatted this spreadsheet to match the default **cell location assignments** for imported transactions.

Compeat 2.0 Sample Spreadsheet

Accounting 2.0 uses an updated version of the sample spreadsheet. For this reason, sample spreadsheets from legacy Advantage will not work on 2.0, and vice versa.



Simply enter your information as modeled in the spreadsheet and upload the file to import your transactions.

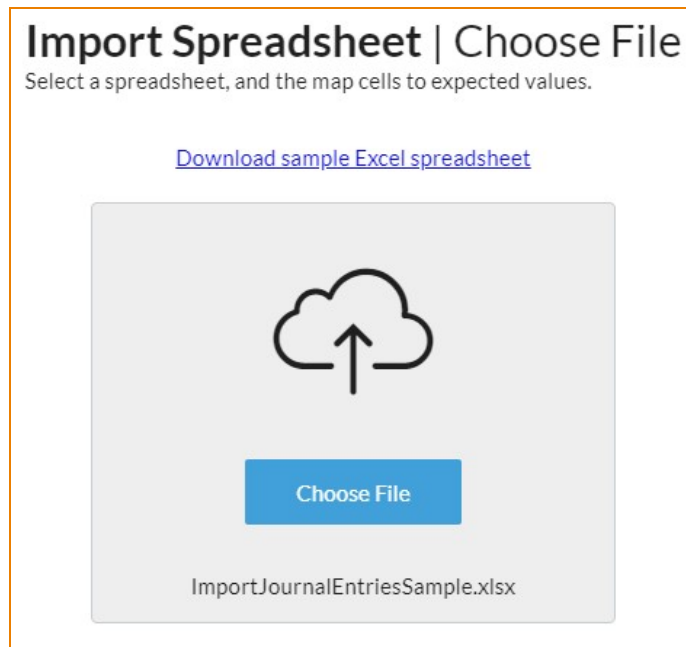
Create Your Own Spreadsheet

You can absolutely use a spreadsheet of your own creation to import journal entries. There are, however, a few requirements:

- » Your spreadsheet must have an Excel (.xls, .xlsx) or CSV (.csv) file type.
- » Entries must appear on the first sheet of the workbook. Compeat does not import beyond the first sheet.
- » When importing, you must tell Compeat where to find necessary information in your sheet. Learn more about this process in our [cell mapping](#) section.

Select Your Spreadsheet

Importing spreadsheets allows you to import one or more files at a time.

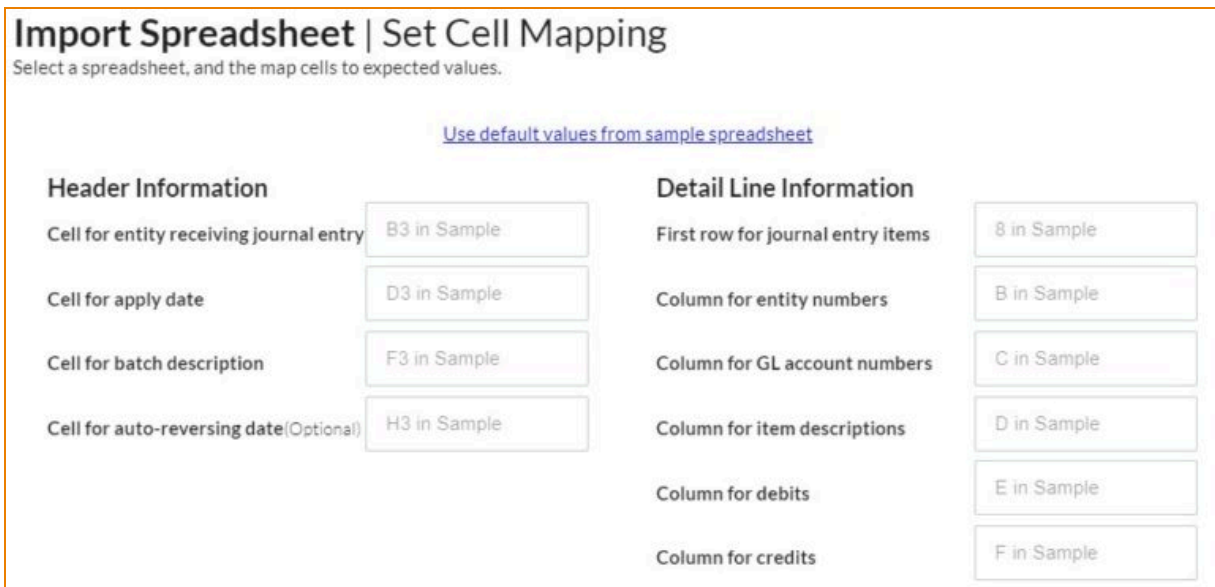


» **Choose File:** Choose which file(s) you wish to import from your device.

Files pending import display by name at the bottom of the import field. Select **Next** to import your file(s).

Set Cell Mapping

Cell mapping tells Compeat where to find each piece of data in your spreadsheet.



» **Using the sample spreadsheet?** Populate the matching default cell locations by selecting *Use Default Values from Sample Spreadsheet*.

» **Using your own spreadsheet?** Enter cell locations that correspond with where the data is located within your file. Note that some cell mappings require a specific cell location (B3, D3, F3, etc.), whereas others require the row or column location.

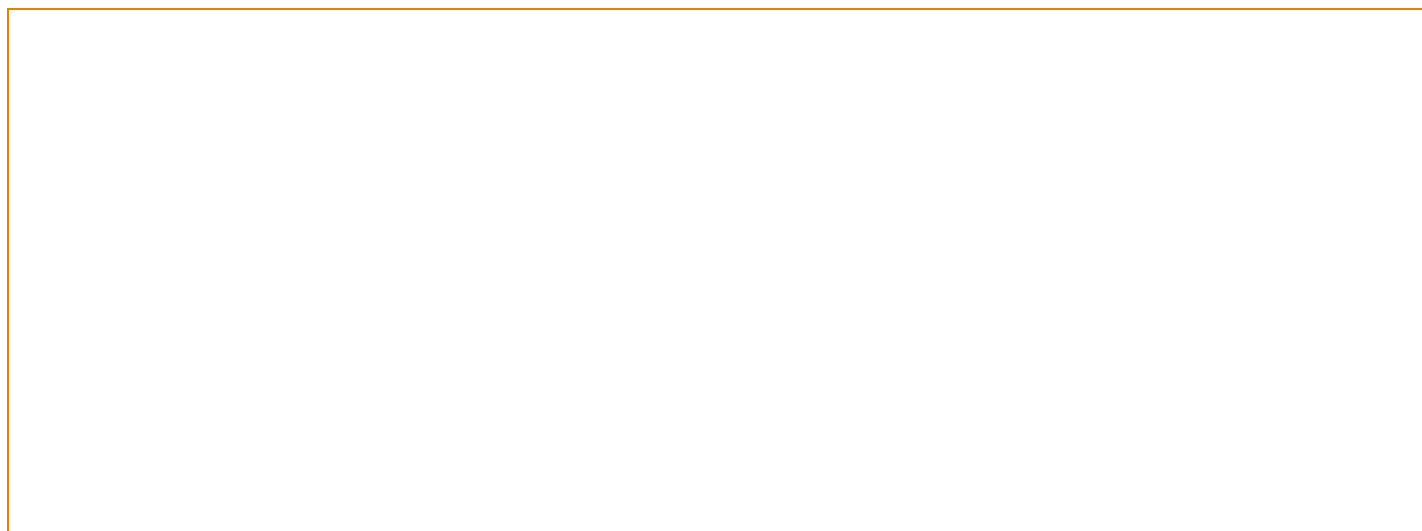
! Importing more than one spreadsheet?

Cell mapping must be identical for all spreadsheets included in your import. If the cell mapping differs, then you must import each spreadsheet separately and enter their unique cell mapping.

Once done, select **Import Spreadsheet**. Compeat alerts you to any errors with your spreadsheet. Your newly imported journal appears in the main General Journal listing. To review the associated entries, select the batch details.

Import from Template

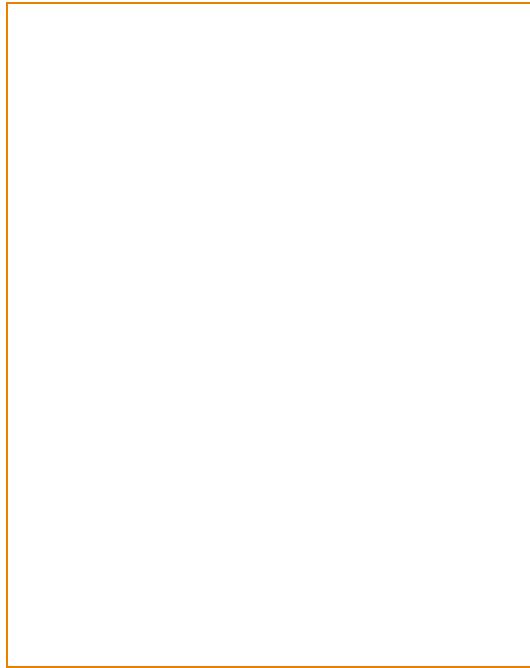
In addition to importing from a spreadsheet, you can also import journal entries using a template. For example, importing payroll journal entries from your payroll provider. You must first configure templates in Compeat before you can import files.



To import journal entries from a template, select the import icon on the left side of the page. This launches the *Import Template* window.

Import Options

Before you import files, select which template you are using from the *Template* dropdown. Import Template allows you to import one or more files at a time.



» **Choose File:** Select this option choose which file(s) you wish to import.

Files pending import display by name at the bottom of the import field. Select **Import** to import your file(s).

Your newly imported journal appears in the main General Journal listing. To review the associated entries, select the journal details.

Updated on April 20, 2021

Tagged: efficiency import journal entries

