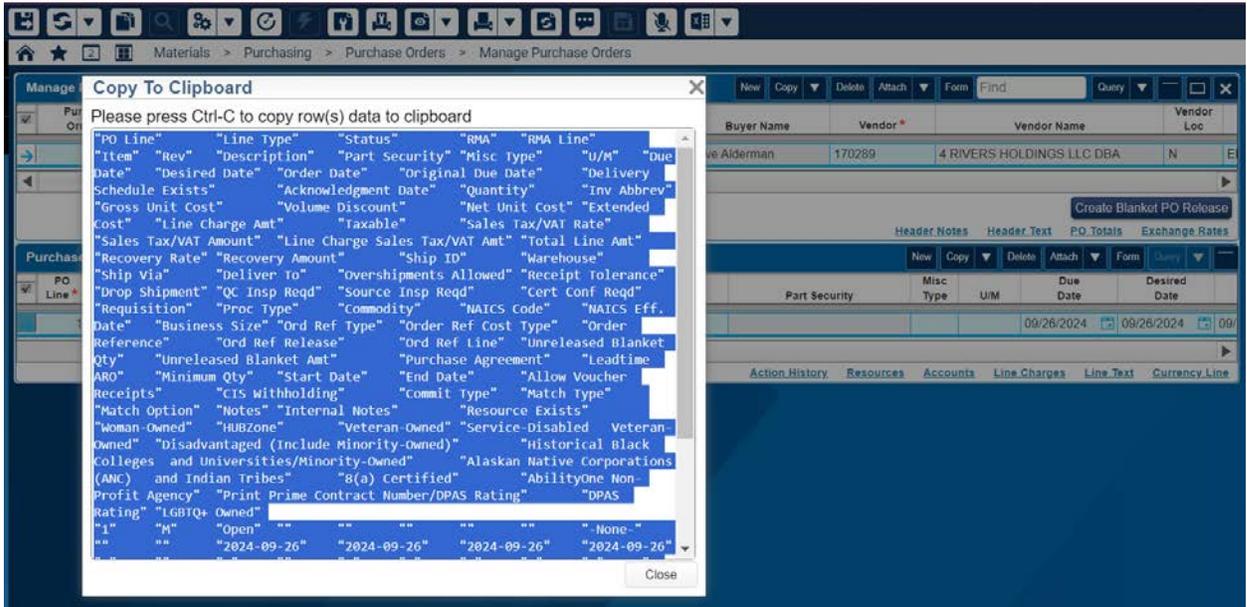
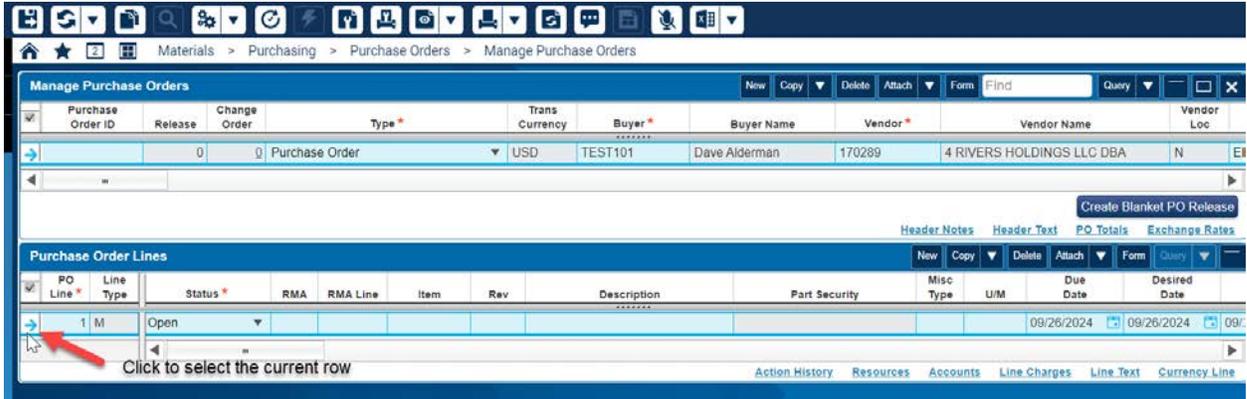


How to Copy Data from Excel to Costpoint

1. Copy the header from the section you currently working in (this example is Purchase Order Lines, but can also be done with Purchase Requisitions). Navigate to Table View, then select "New" to display a blank record. Click the arrow to select the current row and click "Ctrl-C" to copy the header information. This will copy the row data to a clipboard to paste in Excel. Click "Ctrl-C" to copy the data from the clipboard.



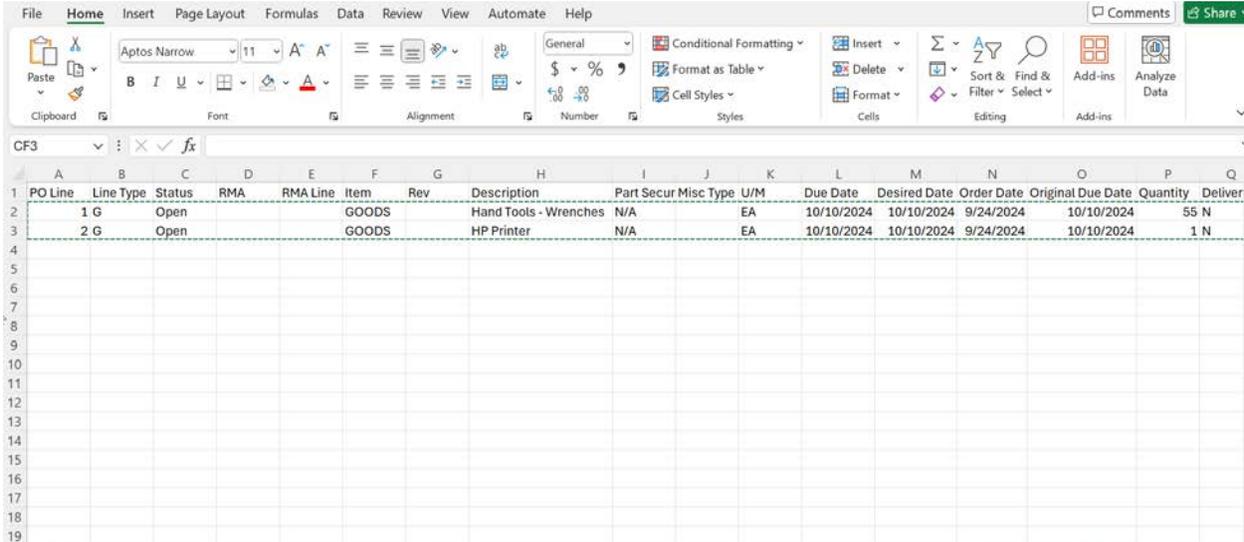
2. Paste the copied data to an Excel spreadsheet.

PO Line	Line Type	Status	RMA	RMA Line	Item	Rev	Description	Part	Secur	Misc	Type	U/M	Due Date	Desired Date	Order Date	Original Due Date	Delivery Sc	Acknowledg	Quantity
1	M	Open					-None-						9/26/2024	9/26/2024	9/26/2024	9/26/2024	N		0

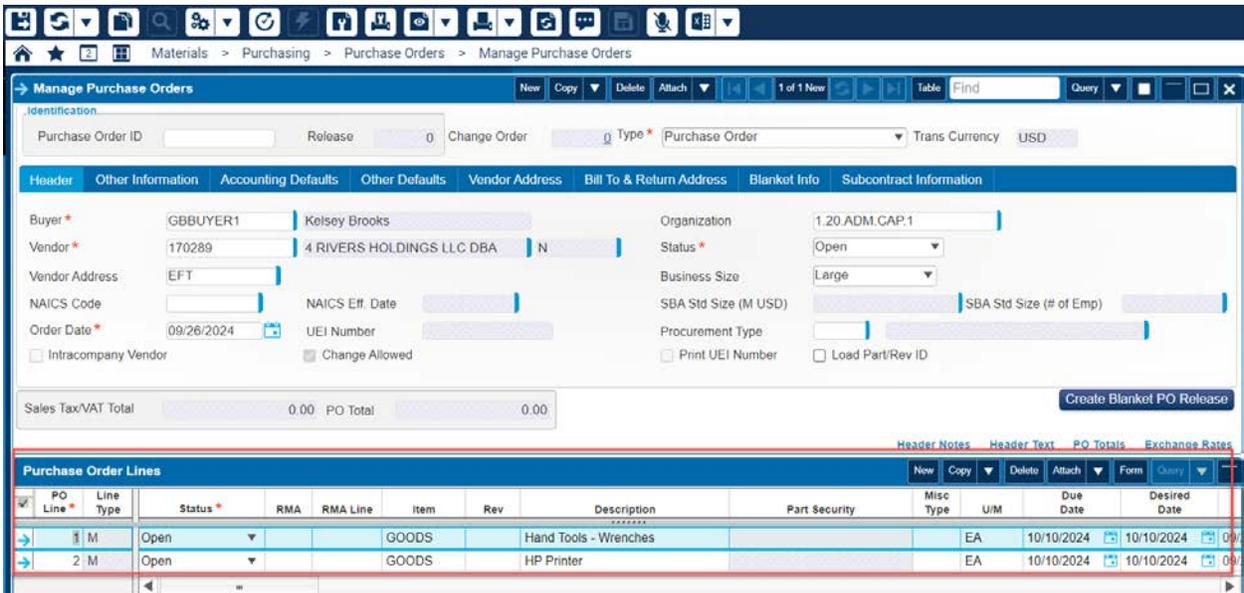
3. Enter your requisition data matching the corresponding headers.

PO Line	Line Type	Status	RMA	RMA Line	Item	Rev	Description	Part	Secur	Misc	Type	U/M	Due Date	Desired Date	Order Date	Original Due Date	Quantity	Deliver
1	G	Open			GOODS		Hand Tools - Wrenches	N/A			EA		10/10/2024	10/10/2024	9/24/2024	10/10/2024	55	N
2	G	Open			GOODS		HP Printer	N/A			EA		10/10/2024	10/10/2024	9/24/2024	10/10/2024	1	N

- After entering your data, select all your information excluding the header (Row 1), and copy (Ctrl-C). Avoid including the headers on line 1.



- Now, navigate back to Costpoint, click on the first line's PO Line (or Req Line) column, and paste (Ctrl-V) your copied data into the first line. You will see the data from Excel is now entered into Costpoint.



- Save your Purchase Order (or Requisition) once all data is entered.