

## Vendor Import Setup

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# Vendor Import Setup

**Setup Path:** *Settings > Accounts Payable > Vendor Imports*

**Import Path:** *Records > Vendors > New drop-down menu > Import*

Vendors can be imported to SGA from a list when many new vendors need to be added.

**Name:** The name that will be displayed as the name of the import.

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## General

**Active:** A Vendor Update Import must be active for entry to be allowed. If a Vendor Update Import is inactive, the setup information may be browsed; however, it will not be available as a selection for importing.

**Connector type:** Defines the communication method, protocol, or interface used to access and retrieve the data.

**Connection string:** A string of text that specifies the information needed to establish a connection between the software and a data source, such as a database file or external service. It acts like a set of instructions or a key that tells the software to locate and access the data it needs to import.

**Reference columns by:** Determines how the columns in your data are identified during the import process.

- **Reference by Name:** This means you use the column header or the column name to refer to data.
- **Reference by Number:** This means you reference columns based on their position or index within a dataset. So instead of using the column name, you refer to the column by its numerical position.

**Use schema:** In certain situations, the import setup may require a way to name the individual items being imported and/or the type of information (text, decimal, etc.) contained in each column.

**Command text:** When the Connection string is defined, the Command text will be defaulted to select all items from the external file. The Command text can be modified when there are situations that require the information from the file to be manipulated in some way in order to obtain certain results. An example of this would be when multiple columns from the external file need to be combined into one item to be used as a transaction comment. Another example would be if the information from the external file needs to be sorted or subtotaled in order to create a batch with fewer, or more meaningful, transactions. For additional information on this feature, please contact SGA support.

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## Setup

**Primary Address ID:** Enter the name of the default address ID to be assigned to the imported addresses.

**Vendor Type:** Select the default type to be assigned to the imported addresses.

## Columns

**From Column:** Add lines for each external column you wish to import. **From Column** is the column name or number on the external file; see **Reference columns by** above.

**To Column:** Click on the drop down arrow to select the SGA item that matches what is listed in the From Column. The available columns are:

Column Name	Required	Comments
Name	Yes	The vendor name entered in the format used to search and sort in the vendor browse.
Payment Name	No	Name to be used on the check if different from the vendor name.
Status	No	Status to be used for the vendor. If not specified, the vendor will be added with an active status.
Vendor Type	No	Type of vendor. If not specified, the default Type from the Setup tab will be used.
Vendor Account	No	The number that identifies your organization to the outside vendor. This number can be included on payments to help ensure the monies are applied to the proper account.
Address ID	No	The name of the address ID to be assigned to the imported addresses. If not specified, the default ID from the Setup tab will be used.
Contact	No	Contact information for the imported vendor.
Address 1	No	First address line.
Address 2	No	Second address line.
City	No	City
State	No	2 digit state code
Zip	No	Zip code. Allows for up to 15 characters
Phone 1	No	Primary phone number
Phone 2	No	Secondary phone number
Fax	No	Fax number
Email	No	Email address
Dft Account	No	Default expense account for invoice entry
1099 Code	No	Default 1099 code for invoice entry
W9	No	Code to indicate if the W9 form is on file
Federal ID	No	Federal ID for 1099 reporting
1099 Name Override	No	Name to be used on the 1099 form if different from the vendor name
Separate Payment Per Invoice	No	If specified, each invoice will generate a unique check number upon making payment

Account Type	No	For EFT payments, specify the bank account type of C = Checking or S = Savings
Bank Routing Nbr	No	For EFT payments, specify the bank route number
Bank Account Nbr	No	For EFT payments, specify the bank account number
Send Email Notification	No	For EFT payments, specify if the remittance information is to be emailed to the vendor following the payment processing
Dft Due Date Days	No	If specified, the payment terms to be defaulted to the vendor invoices. Enter the number of days to calculate the due date starting with the invoice date.
Additional Custom Items	No	If custom information items exist on the Vendor maintenance screen, the items will also be available for mapping to the external file for importing.

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