

Company Archive Uploader

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Use this page to download a formatted Excel spreadsheet for uploading historical invoices, payments, and credits to the database.

1. Click Download Template.
2. Open the downloaded Excel spreadsheet.
3. Save the spreadsheet as a new name.
4. Read the information on the Legend worksheet.
5. Review samples on the Example Data worksheet.
6. Add data to upload to the Format Layout worksheet. Column headings with red text are required.
7. Delete the Legend worksheet.
8. Delete the Example Data worksheet.
9. Save the spreadsheet.
10. On the Company Archive Uploader page, click Select File.
11. Browse to the spreadsheet and click Open.
12. Verify the correct spreadsheet has been selected.
13. On the Company Archive Uploader page, click Upload.
14. At the Please Confirm message, click Yes.