

# MYOB EXO BUSINESS WHITE PAPER Quick Insert

EXO BUSINESS

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# Overview

Quick Insert is method that facilitates data imports and enables rapid updates of multiple records in a grid format, without the use of third-party database explorer tools.

It is used by MYOB EXO Business to control the Quick Insert tabs of account groups and product groups etc, but it can also be used to define Quick Insert tabs with validation for user defined tables.

It is assumed that the operator is familiar with relational database technologies and the MYOB EXO Business schema. If you are unsure of the effects of using these tools please ask your EXO Business implementation partner for advice on its use.

The purpose of this whitepaper is to outline the standard configuration and demonstrate the functionality to readers already familiar with the EXO Business relational database.

There are some key concepts to be understood:

#### **Quick Insert Tabsheets**

Quick Insert allows fast data entry via "tabsheets". Quick Insert tabsheets are multi-column/row editable onscreen grid representations of the raw data held in the tables in the database. Tabsheets can appear as tabs in EXO Business Config, or they can be added as an EXO Business menu option, so that they appear in their own window.

#### **Quick Insert Templates**

These are a series of rules that can be applied to the data being entered into the tabsheet. The user can define these rules or constraints. They govern such validation as defined ranges of numbers and numeric or alphabetic only input entries.

## Copy to Clipboard

A technique commonly used in EXO Business. Right-clicking on the title bar of a grid copies the contents of that grid into the clipboard memory. You can then paste this data straight into an open Excel spreadsheet.



#### Paste to Grid

A technique allowing appropriately formatted data in a spreadsheet to be pasted directly into the database via a Quick Insert tabsheet or some selected data entry grids in EXO Business that have this function enabled, e.g. Job Quote tab, Creditors Invoice entry, etc. Access the **Paste from clipboard** option by using right-mouse-click in the body of the grid (not the column header).

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Utilities Tax Rates Set Rate Defaults Load Suggested Rates Aging	Ident     Image     Data     Save       Quick Insert Utility       List     Template	
Set Transaction Ages Calculate Aged Balances Calculate Prior Aged Balances	Table name: CONTACTS 1	Primary key: SEQNO Identity: SEQNO Value: 142
Uuick Insert Tabsheets Templates	Seqno Salutation Firstname           72         CRAIG         S           31         Mr         Craig         H           7         Mr         Connor         R	
Clarity Reporting	CONNOR F	Select visible columns
	Р	Paste from clipboard

# **Quick Insert Metadata Changes**

You can define Quick Insert templates for any database table; however, a number of references to Quick Insert tab definitions and profile settings are added automatically.

These additions, which were originally introduced during the upgrade to EXO Business version 6.187, are as follows:

- Add Quick Insert Template menu options
- Add QUICK\_INSERT\_TABSHEET Table
- Add Quick Insert Template Directory profiles
- Add Quick Insert Data Directory profile
- Add Quick Insert Template File Extension profile
- Add Quick Insert Purge Table Before Inserting Data profile
- Add Quick Insert Update Existing Records When Inserting profile
- Add Quick Insert Identity Insert On profile
- Add Quick Insert Copy Column Captions profile
- Add Quick Insert Copy/Paste Column Names profile
- Add Quick Insert Data File Has Column Names profile
- Add Quick Insert Copy/Paste Column Delimiter
- Add Quick Insert Data File Column Delimiter
- Add Quick Insert Tab Sheet for Courier Setup
- Add Quick Insert Tab Sheet for Stock Request Types
- Add Quick Insert Tab Sheet for Financial Year

- Add Quick Insert Tab Sheet for Period History
- Add Quick Insert Tab Sheet for General Ledger Account Groups
- Add Quick Insert Tab Sheet for Dispatch Methods
- Add Quick Insert Tab Sheet for Branches
- Add Quick Insert Tab Sheet for Currencies
- Add Quick Insert Tab Sheet for Payment Groups
- Add Quick Insert Tab Sheet for Payment Types
- Add Quick Insert Tab Sheet for Credit Terms
- Add Quick Insert Tab Sheet for Creditor Account Groups
- Add Quick Insert Tab Sheet for Alternate Creditor Account Groups
- Add Quick Insert Tab Sheet for Stock Groups
- Add Quick Insert Tab Sheet for Alternate Stock Groups
- Add Quick Insert Tab Sheet for Stock Locations
- Add Quick Insert Tab Sheet for Stock Price Groups
- Add Quick Insert Tab Sheet for Price Names
- Add Quick Insert Profile for Size\_Colour\_Enabled
- Add Quick Insert Admin for Style Sizes
- Add Quick Insert Admin for Style Colours
- Add Quick Insert Admin for Debtor Account Groups
- Add Quick Insert Admin for Alternate Debtor Account Groups
- Add Quick Insert Admin for Debtor Price Policy Groups
- Add Quick Insert Admin for Marketing
- Add Quick Insert Admin for Display Names
- Add Quick Insert Admin for Extra Fields
- Add Quick Insert Admin for Staff
- Add Quick Insert Admin for Profile Assignment
- Add Quick Insert Admin for Computer
- Add Quick Insert Admin for Menu Designer
- Add Quick Insert Admin for Bank Formats
- Add Quick Insert Admin for Source Companies
- Add Quick Insert Admin for GL Account Mappings
- Add Quick Insert Admin for GL Contra Accounts
- Add Quick Insert Admin for Conversion Rates
- Add Quick Insert Admin for Inter-Company Companies
- Add Quick Insert Admin for Asset Locations
- Add Quick Insert Admin for Asset Groups

# Setting up Quick Insert

## **Quick Insert Profile Settings**

The following profile settings are available for customising the Quick Insert feature.

Name	Profile Name	Level	Description	Default
Quick Insert template file extension	QUICK_INSERT_TEMPLATE_EXT	Company	File extension of Quick Insert template files. Normally .TEM; however, if this file extension conflicts with another application, you can change it.	"tem"
Quick Insert copy column captions*	QUICK_INSERT_COLUMNCAPTIONS_DEF	Company	Specify the default value for the <b>Copy column captions</b> option for new templates.	Enabled
Quick Insert copy / paste column delimiter*	QUICK_INSERT_COLUMNDELIMITER_DEF	Company	Specify the default value copy/paste column delimiter for new templates (Tab or Comma).	Tab
Quick Insert copy / paste column names*	QUICK_INSERT_COLUMNNAMES_DEF	Company	Specify the default value for the <b>Copy / paste column</b> <b>names</b> option for new templates.	Disabled
Quick Insert data file column delimiter*	QUICK_INSERT_DATA_COLUMNDELIMITER_ DEF	Company	Specify the default value data file column delimiter for new templates (Tab or Comma).	Comma
Quick Insert data file has column names*	QUICK_INSERT_DATA_COLUMNNAMES_ DEF	Company	Specify the default value for the <b>Includes column</b> <b>names</b> option for new templates.	Enabled
Quick Insert identity insert on*	QUICK_INSERT_IDENTITYINSERT_DEF	Company	Specify the default value for the <b>Insert identity on</b> option for new templates.	Disabled
Quick Insert purge table before inserting data*	QUICK_INSERT_PURGEFIRST_DEF	Company	Specify the default value for the <b>Purge records first</b> option for new templates. <b>Note:</b> Use this with care.	Disabled

Profile Name	Level	Description	Default
QUICK_INSERT_UPDATEEXISTING_DEF	Company	Specify the default value for the <b>Update existing records</b> option for new templates.	Enabled
QUICK_INSERT_DISABLE_PURGING	User	Select this option to disable the <b>Purge</b> button on the Quick Insert Utility toolbar and the <b>Purge records first</b> option on the templates Options window.	Enabled
QUICK_INSERT_TEMPLATE_DIR	Computer	Specify where Quick Insert template files are stored.	
QUICK_INSERT_DATA_DIR	Computer	Specify where Quick Insert data files are stored.	
	Profile Name         QUICK_INSERT_UPDATEEXISTING_DEF         QUICK_INSERT_DISABLE_PURGING         QUICK_INSERT_TEMPLATE_DIR         QUICK_INSERT_DATA_DIR	Profile NameLevelQUICK_INSERT_UPDATEEXISTING_DEFCompanyQUICK_INSERT_DISABLE_PURGINGUserQUICK_INSERT_TEMPLATE_DIRComputerQUICK_INSERT_DATA_DIRComputer	Profile NameLevelDescriptionQUICK_INSERT_UPDATEEXISTING_DEFCompanySpecify the default value for the Update existing records option for new templates.QUICK_INSERT_DISABLE_PURGINGUserSelect this option to disable the Purge button on the Quick Insert Utility toolbar and the Purge records first option on the templates Options window.QUICK_INSERT_TEMPLATE_DIRComputerSpecify where Quick Insert template files are stored.QUICK_INSERT_DATA_DIRComputerSpecify where Quick Insert data files are stored.

\* These Company-level profile settings determine the defaults for various template options (see "Template Options" on page 17 for more details on the available options).

# **Configuring Quick Insert Templates**

Quick Insert templates can be created, changed, deleted and previewed in EXO Business Config at **Utilities > Quick Insert > Tabsheets**:



The following section use examples to illustrate how templates can be created and edited.

#### **Creating Templates**

Click **New** to create a new blank template:

🗉 MYOB EXO Business Config - Demo Mode							
File Account Help							
🗄 ្លែ 🖌 💁 Company 🖏 Essential 🛛 🙀 Admin	谢 System 🕺 Profiles 🖃 Forms 🖏 Staff 🔆 Litilities						
Utilities     Tax Rates         Set Rate Defaults         Load Suggested Rates         Calculate Aged Balances         Calculate Prior Aged Balances         Calculate Stock         Cothers         Cothers         CSV Import Wizard         CSV Import Wizard	New Cat Linear Lenglates   Quick Insert Templates     Template file:     Table name:     Template Columns     Invalid Columns     Invalid Columns	Add Al					
Motopartz.co.nz Di	emo ExoAdmin						

Select the table name 'ADJUSTMENT\_TYPES', change the automatically generated template file name to 'MYOB\_ADJUSTMENT\_TYPES.tem', and click **Add All**:

🗉 MYOB EXO Business Config - Demo Mode						
File Account Help 🕡						
🗄 ្ពែ 🛛 🔂 Company 🖏 Essential 📴 Admin	😼 System 🕺 Profiles 🖃 Forms 🕰 Staff <u>🔆 Utilities</u>					
Utilities Utilities Set Rate Defaults Load Suggested Rates Aging	New      Edit      Save      Cancel     Delete     Preview     Proview     Options     Quick Insert Templates     Template					
Set Transaction Ages     Calculate Aged Balances     Calculate Prior Aged Balances     Ouidk Insert	Template file: MYOB_ADJUSTMENT_TYPES.tem Table name: ADJUSTMENT_TYPES					
Gunck Insert     Gunck Insert     Tabaheets     Tabaheets     Gunck Reporting     Garity Reporting     General Ledger     CSV Import Wizard     EXO Config Verification     General Ledger     Retained Earnings     GUN Overments     Export General Ledger Chart Structure     Utilities     Stock     Weighted Average Cost Recalculation     Stock     Weighted Average Cost Recalculation     Stock     System     Load Financial Year     Key System Number Sequences     Purce Records	The columns ATNO ATNO ATDESC	Add Al				
Motopartz.co.nz D	emo ExoAdmin					

Click **Preview** and select **No** to the "Save template changes first?" question (this is handy when editing an existing template, to check the effect of changes before saving).

📕 Quick li	nsert Templa	ate				
File Help						6
1234 Ident	Purge	🗐 Data 🛛 🕌 S	ave 🗙 <u>C</u> an	el 🚰 Options		
emplate file:	Preview MYOB	_ADJUSTMENT_T	Primary key:	ATNO		
able name:	ADJUSTMENT	TYPES	Identity:		Value:	
Atno	Atdesc					
0	SMALL BAL					
1	WRITE OFF					
2	CORRECTION					
3	OPENING BAL					
4	JOURNAL					
5	RETENTION	]				
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Close the preview template screen when finished previewing.

Double click on the ATDESC column (or right click on it and select **Edit**). Edit the properties (e.g. **Caption**, **Width** and **Colour**) and click **OK**:

Quick Inse	ert Template Column
Column:	ATDESC Width: 100 Read only
Caption:	Description Colour: Test text Clear
Lookup [ Key field: SQL staten	List field:
Constraint Custom cor Constraint	ts
Default exp Minimum va Required:	pression: alue: Maximum value:
	OK Cancel

Click **Preview** again:

📕 Quick Ir	nsert Template					
EFile Help						0
1234 Ident	🗍 💼 Purge 🛛 🗐	jata 🛛 🕌 Si	ave 🗙 <u>C</u> an	el 🛛 🚰 Options		
Template file:	Preview MYOB_AD	USTMENT_T	Primary key:	ATNO		
Table name:	ADJUSTMENT_TYPE	S	Identity:		Value:	]
Atno	Description					<u>^</u>
0	SMALL BAL					
1	WRITE OFF					
2	CORRECTION					
3	OPENING BAL					=
4	JOURNAL					
5	RETENTION					
						~
) Mahanaka an						•
Motopartz.co.	.nz					

Click **Options**, enter a data file name, change default options, and click **OK**:

Quick Insert Template (	Options 🛛
Data file Data file name: Purge records first Includes column names	_ADJUSTMENT_TYPES.tem
Delimits columns with: Clipboard copy / paste Copy column captions Copy / paste column names Columns delimited with:	Comma V V V Tab V
General Update existing records Identity insert on	

**Note:** See "Template Options" on page 17 for more information on Template options.

Click Yes to the Validation warning message (as this can be addressed later):

Click **Save** to save the new template and return to the List tab.

#### **Editing Templates**

This section illustrates the possibilities when editing Quick Insert templates, using the Stock Groups template as an example. Double-click on the 'STOCKGROUPS.tem' template:

Change the **Template file** to "TEST\_STOCKGROUPS.tem" (this will delete the original file and create a new one).

In the Template Columns list, select the ISACTIVE column and move it up to the top position (click the Up arrow button or press CTRL+UPARROW). Note columns can also be moved up and alphabetically sorted in this list. Right-click on the 'REPORTCODE' column and select **Delete** (or press the DELETE key) to move it to the Unselected Columns list.

Note: All columns can be deleted by clicking Delete All.

Edit the BRANCHNO column as illustrated below, so that it becomes a required lookup column:

Quick Ins	sert Te	mplate (	Column					
Column:	BRANCHNO Width: 150 Read only							
Caption:	Branch	1		Colour:	<none></none>	Clear		
Lookup	<b>~</b>							
Key field:		BRANCHN	0 1	ist field: B	RANCHNAME			
SQL state	ement:	SELECT BE	ANCHNO, BRANCHNAM	IE FROM BR	ANCHES ORE	DER B) Check		
Constrai	nts 🗹							
Custom c	onstrain	nt:						
Constrain	nt error i	message:						
Default e	xpressio	on:	1					
Minimum	value:		0	Maximum v	value: 0			
Required	:							
					ОК	Cancel		

Click **Check** to check that the SQL statement is valid.

Edit the ISACTIVE column as illustrated below, so that only 'Y' or 'N' values are accepted:

Quick Inse	rt Template (	Column
Column: I	SACTIVE	Width: 60 Read only
Caption: I	s Active	Colour: <none> Clear</none>
Lookup Key field:	nent:	List field:
Constraint	s 🗸	
Custom cor	nstraint:	X = Y OR X = N
Constraint	error message:	Please enter 'Y' or 'N'
Default exp	pression:	Υ
Minimum va	alue:	Maximum value:
Required:		
		OK Cancel

Next, click **Options** and edit the settings as follows:

Data file	
Data file name:	StockGroups.csv
Purge records first	
Includes column names	
Delimits columns with:	Comma 💌
Clipboard copy / paste	
Copy column captions	
Copy / paste column names	
Columns delimited with:	Tab 💌
General	
Update existing records	
Identity insert on	

**Note:** See "Template Options" on page 17 for more information on Template options.

Preview the template, and then save it.

📕 Quick I	nsert Tem	plate							×
File Help								(	0
Ident	🗍 🗍 Purge	Data 🔡 S	ave 🔀 <u>C</u> an	el 🛛 😭 Options					
Template file:	Preview TE	ST_STOCKGROUPS.	Primary key:	GROUPNO			]		
Table name:	STOCK_GR	OUPS	Identity:	GROUPNO	Value:	16	]		
Is Active	Groupno	Groupname		Branch		Autocode	Autocodeno	St	^
Y	0	MISC ITEMS		AUCKLAND				Ν	
Y	1	ENGINE		AUCKLAND				Y	
Y	2	ELECTRICAL		AUCKLAND				Ν	
Y	3	STEERING & SUSPEN	ISION	AUCKLAND				Y	
Y	4	TRANSMISSION & DR	RIVELINE	AUCKLAND				Y	
Y	5	EXHAUST		AUCKLAND				Y	
Y	6	WHEELS & TYRES		AUCKLAND				Y	
Y	7	SERVICES		AUCKLAND				Ν	
Y	8	CAR CARE & ACCES	SORIES	AUCKLAND				Y	
Y	9	TOOLS		AUCKLAND				Y	
Y	10	OIL & LUBE		AUCKLAND				Ν	
Y	11	BRAKES		AUCKLAND				Ν	~
<								>	
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The template file is saved as readable text:

TEST_STOCKGROUPS.tem - Notepad	×
File Edit Format View Help	
<table_name=stock_groups></table_name=stock_groups>	~
<data_file=stockgroups.csv></data_file=stockgroups.csv>	
<purge_firstetac_v></purge_firstetac_v>	
<update_eaisiing=t></update_eaisiing=t>	
<pre>cdata Collumn Name5=Y&gt;</pre>	
<pre></pre>	
<pre><data column="" delimiter="COMMA"></data></pre>	
<columns></columns>	
<column=isactive, "caption="IS" active",="" width="60"></column=isactive,>	
<column=groupno></column=groupno>	
<column=groupname></column=groupname>	
<column=branchno, "caption='Branch",' width="150"></column=branchno,>	
<column=autocode></column=autocode>	
<column=autocodeno></column=autocodeno>	
<column=status></column=status>	
<column=filename></column=filename>	=
<column=groupz_seqno></column=groupz_seqno>	
<pre><column=sales_clsubcode></column=sales_clsubcode></pre>	
<column=purch code="" gl=""></column=purch>	
<column=purch_glsubcode></column=purch_glsubcode>	
<column=co5_gl_code></column=co5_gl_code>	
<column=cos_glsubcode></column=cos_glsubcode>	
<lookups></lookups>	
<column=branchno,keyfield=branchno,listfield=branchname, "sql="SELECT" branchname<="" branchno,="" td=""><td></td></column=branchno,keyfield=branchno,listfield=branchname,>	
FROM BRANCHES ORDER BY BRANCHNO">	
$\langle OUNDIKALNIS \rangle$	
<pre><column=isactive, "perform="" 'n''="" 'y'="" ,="" =="" constrainterrormessage="ptease" customconstraint="x" ontor="" or="" pre="" product="" propeys<="" t="" trypesston_y"="" x="n"></column=isactive,></pre>	
COLUMERRANCHNO DEFAULTEXPRESSION-I, REQUIRED-I/	
<pre><solfilter=></solfilter=></pre>	-

This file can be edited directly, for example, adding an extra column:

<COLUMN=GROUPNO\_INVALID, "CAPTION=Invalid Group No">

🖪 Т	EST_STOCKGROUPS.tem - Notepad	×
File	Edit Format View Help	
<tae <dat <pur <upd <ide <col <col <dat <col <col <col< td=""><td>BLE_NAME=STOCK_GROUPS&gt; TA_FILE=StockGroups.csv&gt; RGE_FIRST=Y&gt; DATE_EXISTING=Y&gt; ENTITY_INSERT=Y&gt; LUMN_CAPTIONS=Y&gt; LUMN_NAMES=N&gt; TA_COLUMN_NAMES=Y&gt; TA_COLUMN_DELIMITER=COMMA&gt; LUMNS&gt; LUMNS&gt; LUMNS&gt;</td><td>^</td></col<></col </col </dat </col </col </ide </upd </pur </dat </tae 	BLE_NAME=STOCK_GROUPS> TA_FILE=StockGroups.csv> RGE_FIRST=Y> DATE_EXISTING=Y> ENTITY_INSERT=Y> LUMN_CAPTIONS=Y> LUMN_NAMES=N> TA_COLUMN_NAMES=Y> TA_COLUMN_DELIMITER=COMMA> LUMNS> LUMNS> LUMNS>	^
<col <col< td=""><td>LUMN=GROUPNO&gt; LUMN=GROUPNO_INVALID, "CAPTION=Invalid Group No"&gt;</td><td></td></col<></col 	LUMN=GROUPNO> LUMN=GROUPNO_INVALID, "CAPTION=Invalid Group No">	
QOL         QOL           QOL	LUMN=BRANCHNO, "CAPTION=Branch", WIDTH=150> LUMN=RAUTOCODE> LUMN=AUTOCODEN> LUMN=STATUS> LUMN=GROUP2_SEQNO> LUMN=FROFITENAME> LUMN=ROFITENAME> LUMN=PROFITENATATIONES LUMN=PROFITENATIONES LUMN=PROFITENATIONES LUMN=PROFITENATIONES LUMN=SCS_GLSUBCODE> LUMN=SCS_GLSUBCODE> LUMN=SCS_GLSUBCODE> LUMN=SCS_GLSUBCODE> LUMN=SS OKUPSS NSTRAINTSS NSTRAINTSS NSTRAINTSS NSTRAINTSS	

If templates are passed around and loaded on different databases, there is the likelihood of nonexistent columns. Also, columns may be spelt incorrectly (if entered manually). If you save the manually edited template above, then edit the template in the EXO Business Configurator, you will see "GROUPNO\_INVALID" in the Invalid Columns list:

ile Account Help		G
2. 🖸 Company 🦏 Essential 📷 Admi	n ŷ System 🔞 Profiles 🖃 Forms 🐔 Staff 🔆 Utilities	
Utilities Utilities Set Rates Set Rate Defaults Load Suggested Rates Aging Set Transaction Ages Calculate Aged Balances Quick Insert Tabsheets Utility Clarity Reporting Carity Reporting Carity Reporting Carity Reporting Config Verification General Ledger CSV Import Wizard Export General Ledger Chart Structure Utilities Stock Weighted Average Cost Recalculation System Load Financial Year	New       ■ Edit       Save       Cancel       ■ Preyjew       ■ Options         Quick Insert Templates       Template       ■ <t< td=""><td>Add Al</td></t<>	Add Al
- Key System Number Sequences		0

On saving the template, the user will be informed of any invalid columns, but there is no harm leaving them there, as they will simply be ignored when the template is loaded for use.

#### **Deleting Templates**

To delete a template file, select it in the list and click **Delete**, then select **Yes** to the confirmation message.

#### Changing a Quick Insert Tabsheet's Template

To use the newly edited and renamed **TEST\_STOCKGROUPS.tem** template in the Stock Groups setup screen, edit the Tabsheet record to point to the new template.

In the Quick Insert Tabsheets screen, right click the grid title and select the **Select visible columns** option, then enable the "Tabsheet name" column.

Locate the record with the 'STOCK\_GROUPS' tabsheet name, double-click on it to open it for editing, and change the **Template name** to "TEST\_STOCKGROUPS.tem":

HYOB EXO Business Config - Demo M	ode					
File Account Help		0				
🗄 📴 🗹 Company 🖏 Essential 🛛 🗃 Admin	🛞 System 🔞 Profiles 📑 Forms 🕰 Staff 🔀 Utilities					
🖃 Utilities	🛅 New 🛛 💭 Save 🗙 Cancel 🛛 🕅 🔹 🕨					
- Set Rate Defaults	Quick Insert Tabsheets					
- Load Suggested Rates	Details					
Set Transaction Ages	Seq no: 17					
Calculate Prior Aged Balances	Tabsheet name: STOCK_GROUPS					
Quick Insert     Tabsheets	Tabsheet description: Admin> Stock> Stock Groups					
Templates	Template name: TEST_STOCKGROUPS.tem					
Clarity Reporting	Is active					
- Resolve "field does not exist" errors						

Click Save.

In **EXO Business Config > Admin> Stock> Stock Groups**, click the Quick Insert tab to see the new template loaded:



# Using Quick Insert to Enter Data

Once templates are setup, the Quick Insert function can be used to rapidly enter data in the following places:

- In the Quick Insert Utility in the Utilities section of EXO Business Config.
- On Quick Insert tabs in the relevant configuration sections of EXO Business Config.
- In a standalone window, which can be launched from a menu option.

These options are discussed below. The Quick Insert function behaves in the same way regardless of where it is accessed from—a full description of Quick Insert functionality, with examples, will be given in the discussion of the Quick Insert Utility, followed by shorter discussions of the other two options.

# The Quick Insert Utility

The Quick Insert Utility acts as a way of previewing Quick Insert templates without leaving the Utilities section of EXO Config. It is fully functional, however, and can be used to enter and edit data as normal. The utility lists all the Quick Insert templates:



Double click on a template to load it:

MYOB EXO Business Config - Demo Mo	ode							
File Account Help								0
👔 🔁 Company 🦓 Essential 🛛 🗃 Admin	谢 System	92 Profiles	😑 Forms 🛛 🕵 Sta	aff 🧏 Utilitie	S			
Utilities  Tax Rates  Set Rate Defaults  Load Suggested Rates  Aging  Set Transaction Ages	Izza     Ident       Quick Inser       List       Template file:	TEST STOC	Mata Sav	re <u>C</u> ance	GROUPNO			
Calculate Aged Balances Calculate Prior Aged Balances	Table name:	STOCK_GR	OUPS	Identity:	GROUPNO	Value:	16	j
Gook JBEL     Gook JBEL	Y           Y	Groupno 0 1 1 2 2 3 3 4 4 5 6 6 7 7 8 9 9 10 0 111 122 13 14 4 15 5 16	UTOUPDAME MISC ITEMS ELECTRICAL STEERING & SUSPEN TRANSMISSION & SUSPEN WHEELS & TYRES SERVICES CAR CARE & ACCES TOOLS OIL & LUBE BRAKES FUEL SYSTEM HEATING & COOLIW AUDIO PANEL & PAINT SPORTY SWEAT PAN	ISION RIVELINE SORIES S SYSTEM	Branch AUCKLAND AUCKLAND AUCKLAND AUCKLAND AUCKLAND AUCKLAND AUCKLAND AUCKLAND AUCKLAND AUCKLAND AUCKLAND AUCKLAND AUCKLAND AUCKLAND AUCKLAND AUCKLAND AUCKLAND AUCKLAND AUCKLAND		utocode	
Purge Records	<						1	
Motopartz.co.nz D	emo ExoA	dmin						

Once a template is loaded, records in the template table can be inserted, edited and deleted, the identity can be set, the table can be purged, the data file can be loaded, and the template options can be viewed and changed.

#### Changing the Identity Value

To change a template's indent value:

- 1. Enter a new identity value into the **Value** field in the header.
- 2. Click the **Ident** toolbar button to save the value.
- 3. You will be asked to confirm the new value. Values less than the maximum primary key/identity column value are not permitted. Click **Yes**.

#### Purge

**Note:** The purge function is only available if the **Quick Insert – Disable Purge** profile setting is enabled. This setting is disabled by default.

Purge the table by clicking the **Purge** toolbar button. The user will be asked to confirm:



**Note:** The Purge option will delete <u>all</u> records from the table and reset the identity value.

Once a purge has occurred, the user must still **Save** or **Cancel** this action.

## **Template Options**

Quick Insert Template (	Options 🛛 🔀
Data file	
Data file name:	StockGroups.csv
Purge records first	
Includes column names	
Delimits columns with:	Comma 👻
Clipboard copy / paste	
Copy column captions	
Copy / paste column names	
Columns delimited with:	Tab 💌
General	
Update existing records	
Identity insert on	
	OK Cancel

To view the template options, click the **Options** toolbar button.

These options can be changed on the fly and have an immediate effect on the template (on clicking **OK**).

**Note:** The default settings for these options are determined by profile settings—see "Quick Insert Profile Settings" on page 5.

#### **Data File Options**

These options are used when loading a data file into the grid:

- The **Data file name** specifies the file to load when the **Data** option (see below) is selected.
- The **Purge records first** option will purge the table of all records before loading the data file.

**Note:** This option is only available if the **Quick Insert – Disable Purge** profile setting is enabled. This setting is disabled by default.

- If the data file contains column names as the first row, ensure the **Includes column names** option is selected. This option is handy when the column order may not be the same as in the template, or there are fewer columns in the file than in the grid, in which case the template columns are reloaded to reflect this.
- Select the **Delimits columns with** option to the delimiter that is used in the data file to separate columns (Tab or Comma).

#### **Clipboard Copy/Paste Options**

If the user is copying/pasting data directly to/from the grid, ensure these settings are set appropriately:

- If the **Copy column captions** option is selected, a copy from the grid will copy the column captions as the first row (handy for documentation purposes).
- The **Copy / paste column names** option can be used to copy the column names (useful if you need to know the actual column name when creating the data file), and it can be used when pasting text from the clipboard that includes the column names as the first row (in which case the columns are reloaded).

• The **Columns delimited with** option specifies how the text being copied/pasted is delimited (Tab or Comma).

#### **General Options**

This section lists options that are not specific to the sections above:

• If the **Update existing records** option is selected, and a record which already exists is being pasted to the grid (either from the data file or directly from the clipboard), the record is simply located and updated, rather than giving a "unique key violation" error. This option assumes there is a single primary key column, and that it is the first one in the column list.

#### Data

The **Data** button on the Quick Insert Utility toolbar is only enabled when there is a valid **Data file name** specified on the Options window. When this button is clicked, the table is purged (if the **Purge records first** option is selected), the data file is opened and its contents is copied to the clipboard, then pasted to the grid as per the Data File Options and the **Update existing records** option specified (see above).

#### Save/Cancel

The changes to the data grid must be saved or cancelled before moving off the tab. Changes are only applied to the database when **Save** is clicked. To undo all changes (since the last save or cancel), click **Cancel**.

#### Editing, Inserting and Deleting Data in the Grid

To edit a record, select the row or column and start typing. Lookup columns need the value to be selected from a drop down list. Once in the lookup up column, either click the column again or type the first letter of the value you want to select to show the list. Columns with constraints will validate when moving off the column. Pressing ESCAPE will undo the change just made.

To insert a record, press the DOWNARROW key and start typing in the new row just inserted. This row will contain any defaults specified on the Column properties, e.g. "WELLINGTON" (Branch No 2) for the BRANCHNO lookup column. The row will only be posted once all required fields are set, e.g. if the user arrows off the line before setting the active flag, an error message telling them that this column must have a value will appear:

Multiple records can be selected at once (by holding down SHIFT and arrowing up/down, or by holding down CTRL and clicking the row with the mouse) and then deleted by pressing CTRL+DELETE.

#### Creating a Data File

You can edit data by copying it from the ExoGrid in the Quick Insert Utility to Microsoft Excel, then modifying it and then copying it back into the Quick Insert utility. However, you can also load the data from a separate file, such as a CSV file, into the Quick Insert Utility.

To create the **StockGroups.csv** data file specified on the TEST\_STOCKGROUPS.tem template (which does not yet exist in the Quick Insert data directory):

- 1. Load the template in EXO Business Config > Utilities > Quick Insert > Utility.
- 2. Click Options.
- 3. Enable the Copy / paste column names option.

- 4. Click OK.
- 5. Right-click on the grid title and select the **Copy to clipboard** option.
- 6. Open Excel, create a new spreadsheet and paste in the text just copied to the clipboard:

	A1		✓ ● f <sub>x</sub> Is Active							*
	А	В	С	D	E	F	G	Н	Ι	J 🗖
1	Is Active	Groupno	Groupname	Branch	Autocode	Autocoden	Status	Filename	Group2_se	Expectedp1 P:
2	ISACTIVE	GROUPNO	GROUPNAME	BRANCHN	AUTOCOD	AUTOCOD	STATUS	FILENAME	GROUP2_S	EXPECTED P.
- 3	Y	0	MISC ITEMS	0			N			
4	Y	1	ENGINE	0			Y	ENGINE.G	IF	
5	Y	2	ELECTRICAL	0			N			
6	Y	3	STEERING & SUSPENSION	0			Y	SUSPENSI	ON.GIF	
7	Y	4	TRANSMISSION & DRIVELINE	0			Y	TRANSMIS	SION1.GIF	
8	Y	5	EXHAUST	0			Y	EXHAUST1	.GIF	
9	Y	6	WHEELS & TYRES	0			Y	TYRES.GIF		
10	Y	7	SERVICES	0			N			
11	Y	8	CAR CARE & ACCESSORIES	0			Y	CARCARE.	GIF	-
12	Y	9	TOOLS	0			Y	TOOLS.GI	:	
13	Y	10	OIL & LUBE	0			N			
14	Y	11	BRAKES	0			N			
15	Y	12	FUEL SYSTEM	0			N			
16	Y	13	HEATING & COOLING SYSTEM	0			N			
17	Y	14	AUDIO	0			N			
18	Y	15	PANEL & PAINT	0			N			
19	Y	16	SPORTY SWEAT PANT	0			Ν		0	0
20										
21										
22										
23										
24	N Shoot1	Chaot2 C	hoat?			14				
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7. Resize the columns, remove the first row of captions, delete the PURCH\_GL\_CODE and PURCH\_GLSUBCODE columns, move the ISACTIVE column, and add two new rows:

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	А	В	С	D	Е	F	G	Н	Ι	4
1	Groupno	Groupname	Is Active	Branch	Autocode	Autocoden	Status	Filename	Group2_se F	3x
2	0	MISC ITEMS	Y	0			Ν			
- 3 -	1	ENGINE	Y	0			Y	ENGINE.GIF		
4	2	ELECTRICAL	Y	0			Ν			
5	3	STEERING & SUSPENSION	Y	0			Y	SUSPENSION.GIF		
6	4	TRANSMISSION & DRIVELINE	Y	0			Y	TRANSMISSION1.GIF		
7	5	EXHAUST	Y	0			Y	EXHAUST1.GIF		
-8	6	WHEELS & TYRES	Y	0			Y	TYRES.GIF		
9	7	SERVICES	Y	0			N			
10	8	CAR CARE & ACCESSORIES	Y	0			Y	CARCARE.GIF		
11	9	TOOLS	Y	0			Y	TOOLS.GIF		
12	10	OIL & LUBE	Y	0			N			
13	11	BRAKES	Y	0			N			
14	12	FUEL SYSTEM	Y	0			Ν			
15	13	HEATING & COOLING SYSTEM	Y	0			Ν			
16	14	AUDIO	Y	0			Ν			
17	15	PANEL & PAINT	Y	0			Ν			
10	16	SPORTY SWEAT DANT	Y.	0			N		0	
19	20	New Stock Group 1	Ν	1			Ν			
20	30	New Stock Group 2	Y	2			Ν			
21										
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14 4	Stock	aroups 🖓				14			•	

8. Save the spreadsheet into the QI Templates directory as **StockGroups.csv** and close it, ensuring that it is saved in CSV format (readable from Notepad).

Data files can also be created with a Tab column delimiter by copying cells from Excel and pasting into Notepad. The data file **Delimits columns with** option would need to be set to "Tab" and the data file name would need to point to this file:

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GROUPNO	GROUPNAME	ISACTIVE	E	BRANCHN	D	AUTOCOD	E	AUTOCODE	INO	STATUS	FILENAME
0	MISC ITEMS	Y	0			N					
1	ENGINE Y	0			Y	ENGINE.	GIF				
2	ELECTRICAL	Y	0			N					
3	STEERING & SUSPE	NSION	Y	0	-		Y	SUSPENSI	CON.GIF		
4	TRANSMISSION & D	RIVELINE	E	Y	0			Y	TRANSMI	SSION1.G	IF
5	EXHAUST Y	0	_		Y	EXHAUST	1.GIF				
6	WHEELS & TYRES	Y	0			Y	TYRES.G	IF			
7	SERVICES	Y	0			N					
8	CAR CARE & ACCES	SORIES	Y	0			Y	CARCARE.	GIF		
9	TOOLS Y	0			Y	TOOLS.G	IF				
10	OIL & LUBE	Y	0			N					
11	BRAKES Y	0			N						
12	FUEL SYSTEM	Y	0			N					
13	HEATING & COOLIN	IG SYSTEM	4	Y	0			N			
14	AUDIO Y	0			N						
15	PANEL & PAINT	Y	0			N					
16	SPORTY SWEAT PAN	IT	Y	0			N		0	0	0
20	New Stock Group	1	N	1			N				
30	New Stock Group	2	Y	2			N				
<											×
(*)											

#### Using a New Data File

Reload the template in **EXO Business Config > Utilities > Quick Insert > Utility**. Now that the data file exists, the **Data** button is now enabled:

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Utilities  Tax Rates  Set Rate Defaults Load Suggested Rates  Ading	Izan     Ident       Quick Inser       List     Tem	Durge t Utility plate	Data Sav	re <u>X C</u> ance	Options		
- Set Transaction Ages - Calculate Aged Balances - Calculate Prior Aged Balances	Template file: Table name:	TEST_STOCK_GR	CKGROUPS.tem	Primary key: Identity:	GROUPNO GROUPNO	Value: 16	
Quick Insert  Tabsheets  Templates  Utility  Clarity Reporting  Resolve "field does not exist" errors  Others  CSV Import Wizard  EXO Config Verification  General Ledger  Retained Earnings  GL Movements  Export General Ledger Chart Structure Utilities  Stock  Weighted Average Cost Recalculation  Stock  Weighted Average Cost Recalculation  Stock  System  Load Financial Year  Key System Number Sequences	Is Active           Y	Groupno 0 1 2 3 3 4 4 5 6 6 7 7 8 9 9 10 0 111 112 13 14 4 15 5 6	Groupname MISC ITEMS ENGINE ELECTRICAL STEERING & SUSPEN TRANISSION & DI EXHAUST WHEELS & TYRES SERVICES CAR CARE & ACCES TOOLS OOLS OOLS OOLS BRAKES FUEL SYSTEM HEATING & COOLINI AUDIO PANEL & PAINT SPORTY SWEAT PAN	ISION RIVELINE SORIES G SYSTEM	Branch AUCKLAND AUCKLAND AUCKLAND AUCKLAND AUCKLAND AUCKLAND AUCKLAND AUCKLAND AUCKLAND AUCKLAND AUCKLAND AUCKLAND AUCKLAND AUCKLAND AUCKLAND AUCKLAND AUCKLAND AUCKLAND AUCKLAND	Autocode	
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Click **Data** to load the data file:

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tessential 📷 Admin	💷 System   Profiles 📑 Forms 🕵 Staff	📯 <u>U</u> tilities
Utilities  Tax Rates  Set Rate Defaults Load Surgested Rates	IIII Ident   💼 Purge 📲 Data 🕃 Save Quick Insert Utility	Cancel Options
Aging     Set Transaction Ages     Calculate Aged Balances     Calculate Prior Aged Balances	List         Template           Template file:         TEST_STOCKGROUPS.tem         Pri           Table name:         STOCK_GROUPS         Ide	imary key: GROUPNO lentity: GROUPNO Value: 0
Quick Insert Tabsheets Templates Utility Carity Reporting Resolve "field does not exist" errors Others CSV Import Wizard EXO Config Verification General Ledger Retained Earnings GL Movements Export General Ledger Chart Structu Utilites Stock Weighted Average Cost Recalculatio	Groupno Groupname 2 ELECTRICAL 3 STEERING & SUSPENSION 4 TRANSMISSION & DRIVELINE 5 EXHAUST 6 WHEELS & TYRES 7 SERVICES 8 CAR CARE & ACCESSORIES 9 TOOLS 10 OIL & LUBE 11 BRAKES 12 FUEL SYSTEM 13 HEATING & COOLING SYSTEM 14 AUDIO	Is Active     Branch     Autocode       Y     AUCKLAND       Y     AUCKLAND
Stock Transaction Update Recalculate Stock System Load Financial Year Key System Number Sequences	15 PANEL & PAINI 16 COOPTY SWEAT DANT 20 New Stock Group 1 30 New Stock Group 2	Y AUCKLAND V AUCKLAND N WELLINGTON Y CHRISTCHURCH

Note that the original records have been purged. If this is not desired, click **Cancel**, then click **Options**, deselect the **Purge records first** option, and click **OK**. Click **Data** again and note that the data file records have been appended.

Click **Data** again and notice that nothing appears to change. The data file records are actually being loaded, but they are simply locating the existing record and updating it. To illustrate this, first save the changes, and then click **Options**, disable the **Update existing records** option and click **OK**.

Click **Data** again and a key violation error will occur on the first record.

# Quick Insert Tabs (EXO Business Config)

A Quick Insert tab can be enabled on various sections of EXO Business Config. The Quick Insert tab can be used to quickly inserted, edit or delete records, as an alternative to using the usual **New**, **Edit** and **Delete** options to change one record at a time. This includes copying and pasting data to Excel, making changes and pasting back into the Quick Insert tab.

In the example below, a Quick Insert tab has been enabled for the Stock Groups section. Stock Groups can be edited one at a time on the Stock Groups tab, or details of multiple groups can be edited rapidly on the Quick Insert tab:



Changes must be saved or cancelled before the user can move off the Quick Insert tab. Saved changes are reflected in the main tab (Stock Groups in the example above).

### **Configuring Quick Insert Tabsheets**

Quick Insert tabs are set up and enabled by creating a Quick Insert tabsheet and associating it with a Quick Insert template in EXO Business Config.

Quick Insert tabsheets are configured in EXO Business Config at Utilities > Quick Insert > Tabsheets:

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Company Carlot State Stat	System         Gui Profiles         Forms         SQ         Staff         Utilities           ***         New         Save         Cancel         Id         Image: Save         Cancel         Id         Image: Save         Cancel         Image: Save         Image: Save         Cancel         Image: Save         Image: Save         Cancel         Cancel         Image: Save         Cancel         Cancel         Image: Save         Cancel         Cancel         Cancel <td>me Is active</td>	me Is active
Rey System Number Sequences Purge Records		>
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This section displays all areas of EXO Business Config where Quick Insert tabsheets can be used to enter data. If the **Is active** column displays "Y", this means that the tabsheet is currently available for use in that section.

Double-click on a tabsheet to edit it:

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Utilities	
-Set Rate Defaults Quick Insert Tabsheets	
□ Load Suggested Rates Details	
-Set Transaction Ages -Calculate Aged Balances	
Calculate Prior Aged Balances Tabsheet name: STOCK_GROUPS	
- Tabsheets Tabsheet description: Admin> Stock> Stock Groups	
-Templates -Utility Template name: STOCKGROUPS.tem	
Clarity Reporting Is active	

In this example, the 'STOCK\_GROUPS' tabsheet is used by the system to link the **EXO Business Config** > Admin > Stock > Stock Groups setup screen to the template named "STOCKGROUPS.tem".

If **Is active** is selected for this tabsheet, a Quick Insert tab appears in the **EXO Business Config > Admin > Stock > Stock Groups** setup screen:

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Currencies Payment Groups	tock Groups Quick Insert	0001010	
Payment Types     Payment Denominations     Tax Return Key Points	able name: STOCK_GROUPS.tem Primary k Identity:	GROUPNO GROUPNO	/alue: 16
- Credit Terms	Groupno Groupname Bra	anchno Autocode Autocodeno	Status Filename 🔺
□ Creditors Creditor Account Groups	0 MISC ITEMS	0	N ENGINE C
Alternate Creditor Account Groups     Stock	2 ELECTRICAL	0	N
Stock Groups	3 STEERING & SUSPENSION	0	Y SUSPENS:
Alternate Stock Groups     Stock Locations	4 TRANSMISSION & DRIVELINE 5 EXHAUST	0	Y TRANSMI
	6 WHEELS & TYRES	0	Y TYRES.GI
Stock Unit Definitions	7 SERVICES	0	N
- Warranty	8 CAR CARE & ACCESSORIES	0	Y CARCARE
🖃 Debtors	9 TOOLS	0	Y TOOLS.G.
Debtor Account Groups	11 BRAKES	0	N
Debtor Price Policy Groups	12 FUEL SYSTEM	0	N
Sales	13 HEATING & COOLING SYSTEM	0	N
Marketing	14 AUDIO	0	N
- Cost Codes	15 PANEL & PAINT	0	N
- Shipment Status Shipment Method		U	
Motopartz.co.nz	ExoAdmin		

If there is no valid tabsheet record for the **EXO Business Config > Admin > Stock > Stock Groups** setup screen, i.e. there is no record, or the tabsheet name is incorrect, you will get a message informing you of this on entering the screen, so that you can add/correct the tabsheet record.

It is intended that EXO Business will insert a tabsheet record, as a setup screen is programmatically enabled to a show a Quick Insert tab. EXO Business should provide a default template file for the setup screen at the same time, but not necessarily, as a template can be created by the end user.

# **Quick Insert Template Menu Option**

Quick Insert templates can be added to EXO Business dropdown menus and business flow menus. When selected from a menu, the Quick Insert tabsheet associated with the template appears in a standalone window, allowing quick data entry from anywhere in the EXO Business core module.

## Dropdown Menus

To add a Quick Insert template to a dropdown menu:

1. Edit the menu in EXO Business Config at Staff > Menus > Dropdown Menu.

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Staff Menus Dropdown Menu Business Flow Menu Menu Definition Profile Assignment Staff Computer Security Profiles	Save       Cancel       Image: The second s	ove Down       Shortcuts         Procedures       Filter:         POS Shift Login/Logout       Image: Comparison of the comparison of th
Motopartz.co.nz	Demo ExoAdmin	

2. Add the **Quick Insert Template** procedure to the EXO Business menu, specifying a template name in the parameters:

Aenu Item	
Procedure:	Quick Insert Template
Caption:	Quick Insert Stock Groups
Parameters:	STOCKGROUPS.tem
ShortCut:	None VIcon: No Icon V
	QK Cancel

3. Click **OK**, then save the menu.

#### **Business Flow Menus**

To add a Quick Insert template to a business flow menu:

1. Edit the menu in EXO Business Config at Staff > Menus > Business Flow Menu.



- Add a button control to the menu, then drag the Quick Insert Template procedure onto the button. (Alternatively, you can drag the Quick Insert Template procedure directly onto the menu; this will create a text link to the Quick Insert template.)
- 3. On the Properties window for the Quick Insert Template procedure, enter the template name in the **Parameters** field:

📕 Quick Insert Te		
Quick Insert Template		
Кеу	Value	
Name	Quick Insert Template	
Parameters	STOCKGROUPS.tem	
Left		
Тор		
Width		
Height		
Custom		

4. Click **OK**, then save the menu.

## Opening Quick Insert from a Menu

Selecting the new option from the EXO Business dropdown menu or business flow menu opens the Quick Insert tabsheet in its own window:

🖳 Quick Insert Template								
: File Help								•
📴 Ident   🍿 Purge 📲 Data 🕌 Save 🔀 Cancel   😭 Options								
Template file:	te file: STOCKGROUPS.tem Primary key: GROUPNO							
Table name:	STOCK_GROUPS	Ider	ntity:	GROUPNO	Value: 16		16	
Groupno	Groupname		Branchr	o Autocode	Autocoder	no Status	Filename	^
0	MISC ITEMS			0		N		
1	ENGINE			0		Y	ENGINE.GIF	
2	ELECTRICAL			0		N		=
3	STEERING & SUSPENSION			0		Y	SUSPENSION.GIF	
4	TRANSMISSION & DRIVELINE			0		Y	TRANSMISSION 1. GIF	
5	EXHAUST			0		Y	EXHAUST1.GIF	
6	WHEELS & TYRES			0		Y	TYRES.GIF	
7	SERVICES			0		N		
8	8 CAR CARE & ACCESSORIES			0		Y	CARCARE.GIF	
9	TOOLS			0		Y	TOOLS.GIF	
10	OIL & LUBE			0		N		
11	BRAKES			0		N		~
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Data can be entered and edited in the Quick Insert Template in the same way as it is on the Quick Insert tab and Quick Insert Utility in EXO Business Config. This includes copying and pasting data to Excel.