

Import Order Lines

A guide to importing order lines: the file and its headers, the check, the options, sales and purchase orders, and access rights.

1. Start here

In plain words: A customer sends a spreadsheet with 150 items, and you type them in one by one. **Import Order Lines from Excel / CSV** adds the lines of a quotation, a sales order or a purchase order from a file: the **products** by reference, barcode or name, the **quantity**, and the **price, discount, description** and **unit** when the file has them. Every row is **checked** before anything is added, so you see the errors first.

S00016

Customer: Gulf Trading Co. Expiration: Nov 22

Payment Terms: 30/00000000

Product	Quantity	Unit Price	Taxes	Amount
Add a product Add a section Add a note Catalog				

On the order

Row	In the file	Product	Quantity	Price	Discount	Status	Message
2	MS-100	MS-100 Wireless Mouse	25.00	0.00	0.00	OK	
3	DM-110	DM-110 USB-C Docking Station	10.00	119.00	0.00	OK	
4	LT-014	LT-014 Laptop 14" Business	4.00	0.00	0.00	OK	
5	SC-770	SC-770 Barcode Scanner	8.00	0.00	0.00	OK	
6	PP-AA-5	PP-AA-5 A4 Copy Paper (Box of 5 reams)	50.00	0.00	0.00	OK	
7	MS-100	MS-100 Wireless Mouse	0.00	0.00	0.00	OK	No product matches MS-100-75
8	DM-110	DM-110 USB-C Docking Station	0.00	0.00	0.00	OK	The quantity is not a number

Every row checked

Product	Quantity	Unit Price	Taxes	Amount
MS-100 Wireless Mouse	25.00	0.00	0.00%	\$ 0.00
DM-110 USB-C Docking Station	10.00	119.00	0.00%	\$ 1,190.00
LT-014 Laptop 14" Business	4.00	0.00	0.00%	\$ 0.00
SC-770 Barcode Scanner	8.00	0.00	0.00%	\$ 0.00
PP-AA-5 A4 Copy Paper (Box of 5 reams)	50.00	0.00	0.00%	\$ 0.00

The lines, added

The button on the order, the check of the file, and the lines added.

Tip: Unlike the standard Odoo import, you do not map columns or create the order with the file: you open the order you have and add lines to it, with the prices and taxes of Odoo.

2. What you get

Feature	What it does
Excel and CSV	Files .xlsx, .xls and .csv (comma, semicolon or tab; UTF-8).
Sales and purchase	A button on quotations and on purchase orders in draft.
Products found by	Internal reference, barcode or name; on a purchase order also the vendor's product code.
Headers recognised	In English and Arabic, in any column order: Internal Reference, Barcode, Product, Quantity, Unit Price, Discount, Description, Unit.
The price of Odoo	If the file has no price, the line gets the price of the price list (sales) or of the vendor (purchases).
A check first	Each row is Ready, Warning or Error, with the reason: product not found or ambiguous, bad quantity, price, discount or unit.
Your choice	Import the valid rows only, or nothing if a row has an error. A product already on the order: a new line, more quantity, or skip.
A template	Download an Excel file with the right headers.
The chatter	The import is noted on the order: how many lines, from which file.
Arabic	Everything is translated and works right to left.

3. Requirements

Item	Details
Odoo	19.0 (Community or Enterprise)
Apps needed	Sales (<code>sale</code>) and Purchase (<code>purchase</code>)
License	OPL-1 (Odoo Proprietary License v1.0)

4. Install

- 1 Unzip the package. Inside is `taqnix_import_order_lines.zip` ; unzip it to get the folder `taqnix_import_order_lines` .
- 2 Copy the folder into one of the `addons_path` folders of your Odoo server and restart Odoo.
- 3 Log in as an administrator, activate **Developer mode**, open **Apps** and press **Update Apps List**.
- 4 Remove the "Apps" filter, search **Import Order Lines from Excel / CSV** and press **Install**.

```
# or from the command line
./odoo-bin -c odoo.conf -d YOUR_DATABASE -i taqnix_import_order_lines --stop-after-init
```

5. Prepare the file

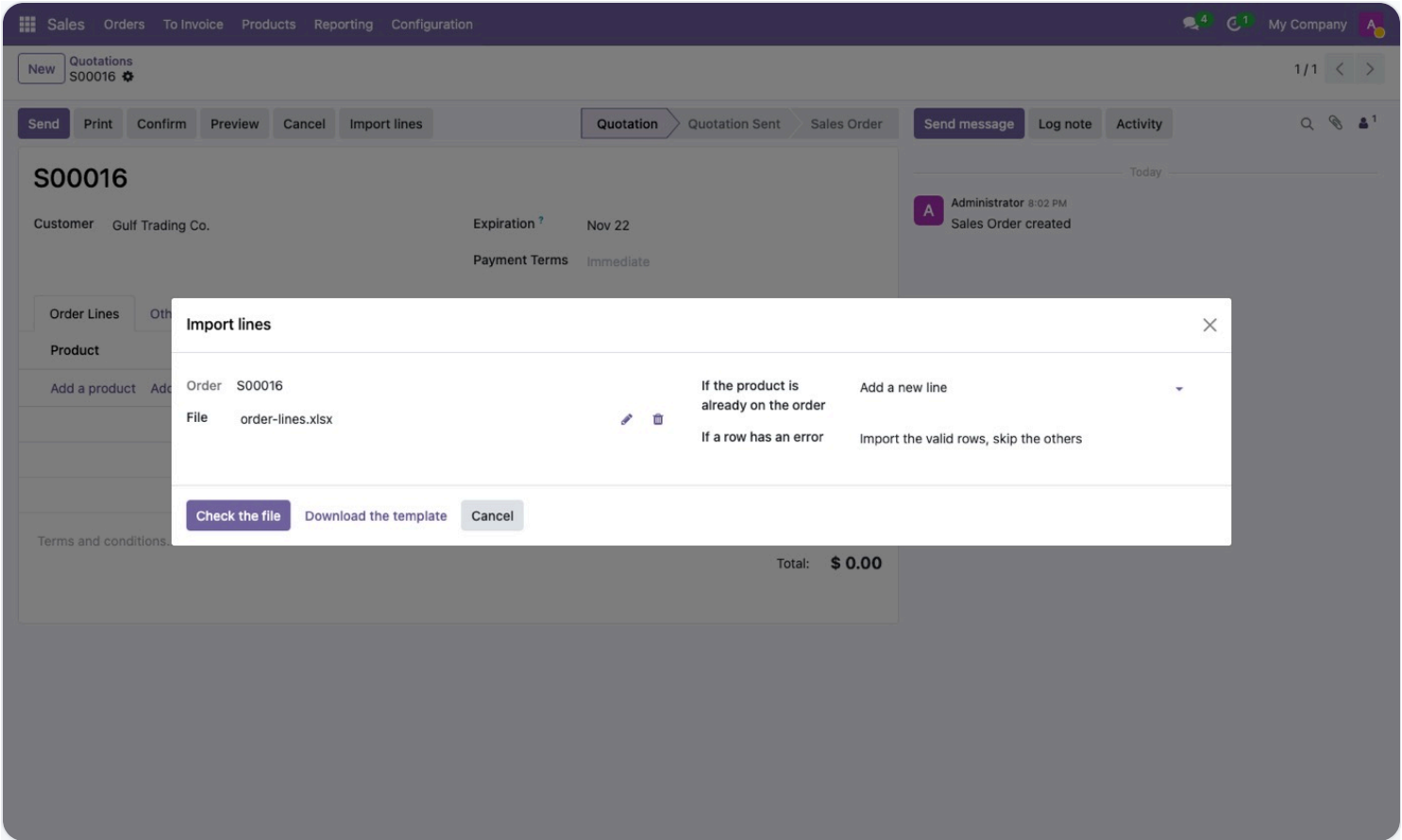
In plain words: The first row holds the headers; each following row is a line. Only the product and the quantity are needed.

Column	Accepted headers	Content
Product	Internal Reference, Reference, SKU, Code / Barcode, EAN / Product, Item	The reference, the barcode or the name of the product. Without case, spaces around are ignored.
Quantity	Quantity, Qty	A number above zero. 1,250.50 and 3,5 are understood.
Price	Unit Price, Price	Optional. Empty: the price of Odoo.
Discount	Discount, Disc	Optional, from 0 to 100.
Description	Description, Label, Name	Optional. Replaces the description of the product on the line.
Unit	Unit, UoM	Optional, the name of a unit of the same family as the product's (Units, Dozens...).

Tip: Click **Download the template** in the wizard for a ready file. Arabic headers (الكمية, الباركود, السعر...) work as well.

6. Import the lines

In plain words: Open a quotation (or a draft purchase order) and click **Import lines**. Choose the file, then click **Check the file**.



The wizard with the file chosen.

Option	Meaning
If the product is already on the order	Add a new line, add to the quantity of the existing line, or skip the row.
If a row has an error	Import the valid rows and skip the others, or import nothing.

SalesOrdersTo InvoiceProductsReportingConfiguration

41My Company

NewQuotationsS00016

1/1<>

SendPrintConf

S00016

CustomerGulf Trade

Order LinesOther

Product

Add a productAdd a discount

Terms and conditions.

Import lines

OrderS00016

If the product is already on the orderAdd a new line

If a row has an errorImport the valid rows, skip the others

Fileorder-lines.xlsx

8 rows5 ready0 with a warning3 with an error

Row	In the file	Product	Quantity	Price	Discount	State	Message
2	MS-100	[MS-100] Wireless Mouse	25.00		5.00	Ready	
3	DK-210	[DK-210] USB-C Docking Station	10.00	119.00	0.00	Ready	
4	LT-014	[LT-014] Laptop 14" Business	4.00		0.00	Ready	
5	SC-770	[SC-770] Barcode Scanner	8.00		0.00	Ready	
6	PP-A4-5	[PP-A4-5] A4 Copy Paper (box of 5 r...	50.00		10.00	Ready	
7	NOPE-77		3.00		0.00	Error	No product matches NOPE-77.
8	CH-310	[CH-310] Visitor Chair	0.00		0.00	Error	The quantity is not a number.
9	TN-XL	[TN-XL] Toner Cartridge XL	6.00		0.00	Error	The unit Liters does not fit this product.

Check again

Import the lines

Download the template

Cancel

The check: 5 rows ready, 3 with an error and the reason of each.

In plain words: When the list is right, click **Import the lines**. Correct the file and **Check again** if you prefer.

SalesOrdersTo InvoiceProductsReportingConfiguration

41My Company

NewS00016

1 / 1<>

SendPrintConfirmPreviewCancelImport lines

QuotationQuotation SentSales Order

Send messageLog noteActivity

S00016

CustomerGulf Trading Co.

Expiration?Nov 22

Payment TermsImmediate

Order LinesOther Info

Product	Quantity	Unit Price	Taxes	Amount
[MS-100] Wireless Mouse	25.00	25.99	15%	\$ 617.26
[DK-210] USB-C Docking Station	10.00	119.00	15%	\$ 1,190.00
[LT-014] Laptop 14" Business	4.00	1,261.99	15%	\$ 5,047.96
[SC-770] Barcode Scanner	8.00	200.99	15%	\$ 1,607.92
[PP-A4-5] A4 Copy Paper (box of 5 reams)	50.00	29.99	15%	\$ 1,349.55

Add a productAdd a sectionAdd a noteCatalog

Terms and conditions...

Untaxed Amount:\$ 9,812.69
Tax 15%:\$ 1,471.90
Total:\$ 11,284.59

Today

Administrator 8:03 PM

\$ 0.00 → \$ 11,284.59 (Total)

\$ 0.00 → \$ 9,812.69 (Untaxed Amount)

Administrator 8:03 PM

5 lines imported from order-lines.xlsx (0 added to an existing line, 0 skipped, 3 rows with an error left out).

Administrator 8:02 PM

Sales Order created

The lines on the quotation, with the prices of Odoo and those of the file, and the note in the chatter.

7. How a row is checked

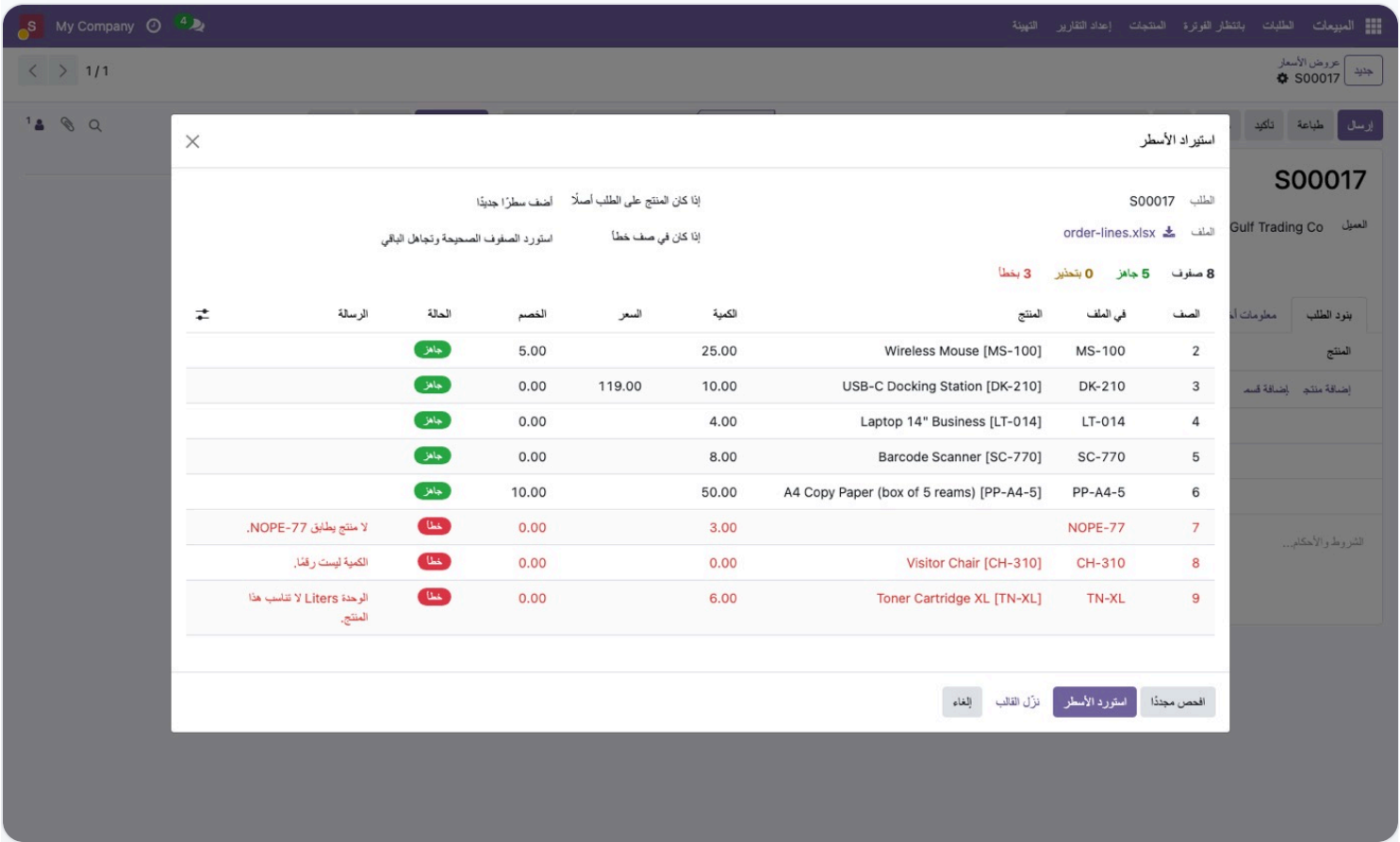
Result	When
Ready	The product is found, the quantity, price, discount and unit are valid.
Warning	The product is found but cannot be sold (or purchased): the line is still imported.
Error	No product matches; several products match (use the reference or the barcode); the quantity is zero, negative or not a number; the price or the discount is not valid; the unit does not fit the product.

In plain words: Row numbers are those of the file, so you find the row in your spreadsheet.

8. Who can do what

Who	Can
Salespeople and purchase users	Import lines into the orders they can edit.
Other users	The button is not on the order, and adding lines is refused by Odoo's access rights.

9. Arabic and right to left



The check in an Arabic interface.

10. Limits

Limit	Detail
Draft orders only	Quotations and draft purchase orders: not confirmed orders.
Up to 5000 rows	In one file.
First sheet	Only the first sheet of an Excel file is read.
Lines only	The order itself (customer, dates) is not created from the file.
No combos	Combo products are not imported.

11. For developers

In plain words: Skip this chapter if you only use the module.

```
wizard = env['taqnix.order.import'].create({'res_model': 'sale.order', 'res_id': order.id}
wizard.action_check()
wizard.line_ids.mapped('message')
wizard.action_import()
```

12. Troubleshooting

Problem	What to do
The file needs a column that tells the product	Name the column Internal Reference, Barcode or Product on the first row.
No product matches	Check the reference; spaces and capitals do not matter; a purchase order also accepts the vendor's code.
Several products are named...	Use the reference or the barcode instead of the name.
The unit does not fit this product	Use a unit of the same family as the one of the product, and an active one.
The Import lines button is missing	It shows on quotations and draft purchase orders only.

13. Updating and removing

Replace the folder with the new version, restart Odoo and run `-u taqnix_import_order_lines` .
Nothing is stored: the lines you imported stay on your orders.

14. Support

Installation help and bug fixes are included for 6 months, with lifetime updates. Contact us through the marketplace page where you bought the module or write to **support@taqnix.com** with your Odoo version and a screenshot.

Changelog

1.0.0 – Initial release

- Import the lines of quotations, sales orders and purchase orders from Excel or CSV
- Products by reference, barcode, name or vendor code
- Quantity, price, discount, description and unit; Arabic and English headers
- A check of each row before the import; options for errors and duplicates
- Template, chatter note, Arabic translation, automated tests