

SpendVue Data Upload Guide

Thank you for choosing SpendVue.
This guide will help you prepare your financial data for upload to ensure the highest quality analysis and reporting.



IMPORTANT: For security reasons, never send financial data by email. Upload all files through the secure SpendVue portal.

Before You Begin

1. Download the Latest SpendVue Template

Always use the latest version of the SpendVue data template before preparing your file.

2. Export Your Financial Data

Export your data directly from your accounting or ERP system whenever possible (e.g., Sage, NetSuite, Xero, SAP, Microsoft Dynamics).

3. Prepare Your File

Populate the SpendVue template with your financial data following the requirements below.

4. Upload Securely

Upload the completed template through the SpendVue secure data portal.

File Requirements

- Supported formats: .xlsx, .xls or .csv
- One worksheet per upload.
- Data must begin in cell A1 with column headers in the first row.
- One transaction per row.
- Ideally include 12 months of transaction history.
- Use a single currency throughout the file.
- Data may be provided in any language.

Data Quality Best Practices

- Ensure vendor names are complete and consistent.
- Exclude payroll, wages and employee compensation.
- Exclude depreciation, amortization and accounting-only adjustments where possible.
- Remove blank rows and duplicate header rows.
- Review the file for missing values before uploading.

Before You Upload

- ☐ I am using the latest SpendVue template.
- ☐ My file contains one worksheet.
- ☐ All required columns are completed.
- ☐ There are no subtotals or summary rows.
- ☐ The file is ready to upload through the secure portal.

Need Assistance?

If you have any questions regarding your data preparation or upload, please contact the SpendVue Data Team and include your SpendVue ID when requesting support.

Column	Required	Description
Date	Yes	Transaction date (MM/DD/YYYY, DD/MM/YYYY or YYYY/MM/DD).
Vendor Name	Yes	Supplier or merchant name for each transaction.
Amount	Yes	Numeric transaction amount. Exclude subtotals and grand totals.
Financial Account Description	Recommended	Account or ledger description used for categorization.
Memo / Comments	Recommended	Additional transaction details or internal notes.
Location	Recommended	City, office or geographic location, where applicable.