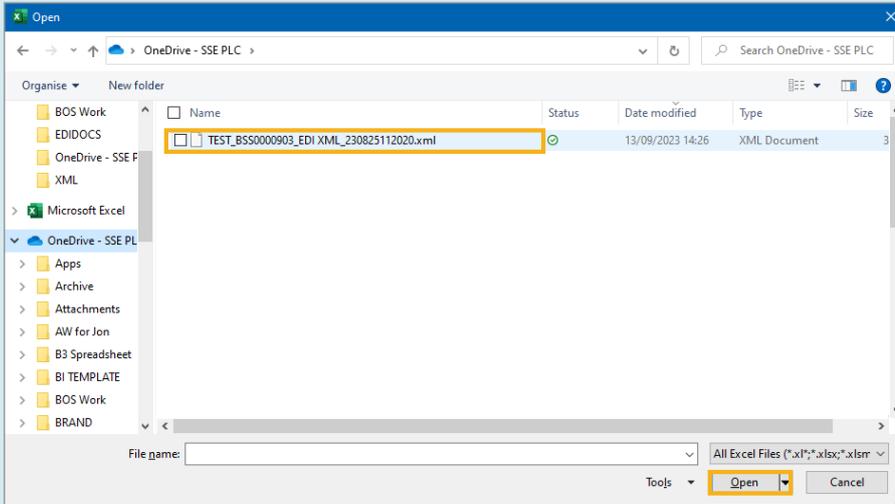


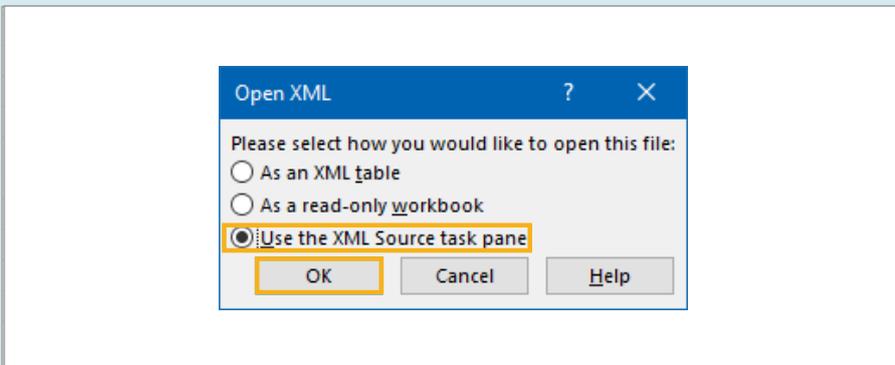
Step 3

Find the file you saved in Step 1 and select 'Open'.



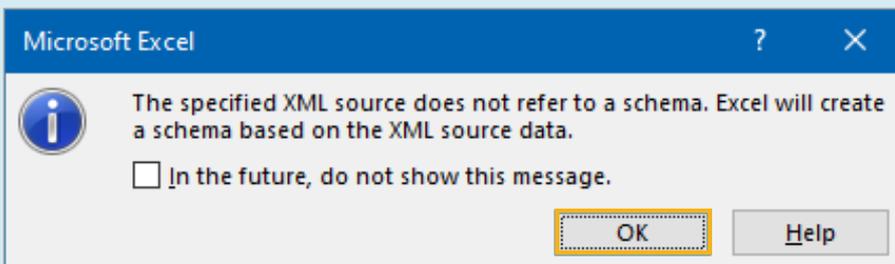
Step 4

When the dialog box appears, select the below option and click 'OK'.



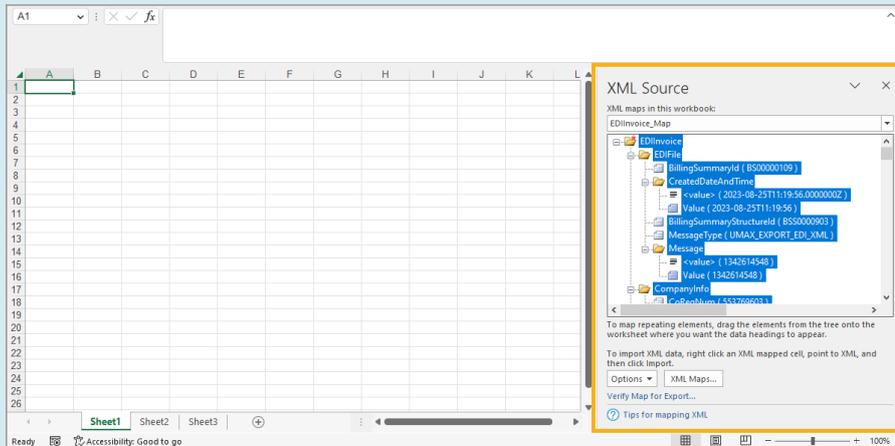
Step 5

When the below dialogue box opens, click 'OK' to continue. This will then open an Excel workbook.



Step 6

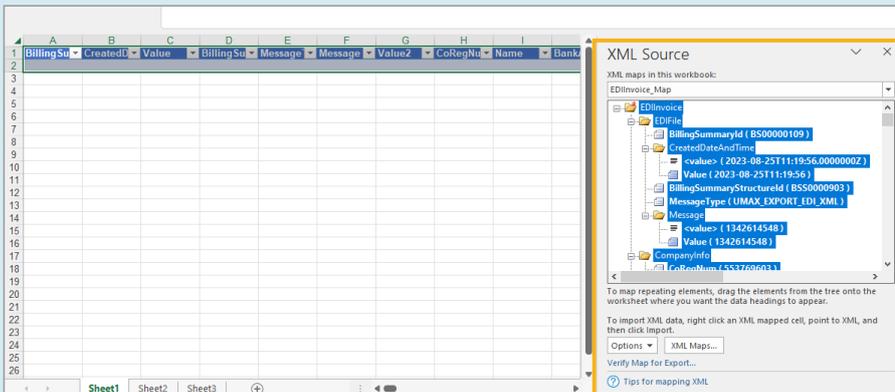
You will now see the XML source structure on the right-hand side pane of the Excel workbook.



From this point, you'll be creating the template ready to accept the content of the XML data.

Step 7

By left-clicking the folder elements listed, you can drag and drop them into cell A1. For illustration, we have dragged the 'EDIInvoice' parent folder element into the Excel workbook.



Note: You can create all the headers that sit below a parent folder in the spreadsheet by selecting, then dragging and dropping the parent folder into cell A1 (highlighted in the image above).

If you want to customise your data to only see relevant data elements you can select that particular element from the right-hand pane and drag this into the spreadsheet.

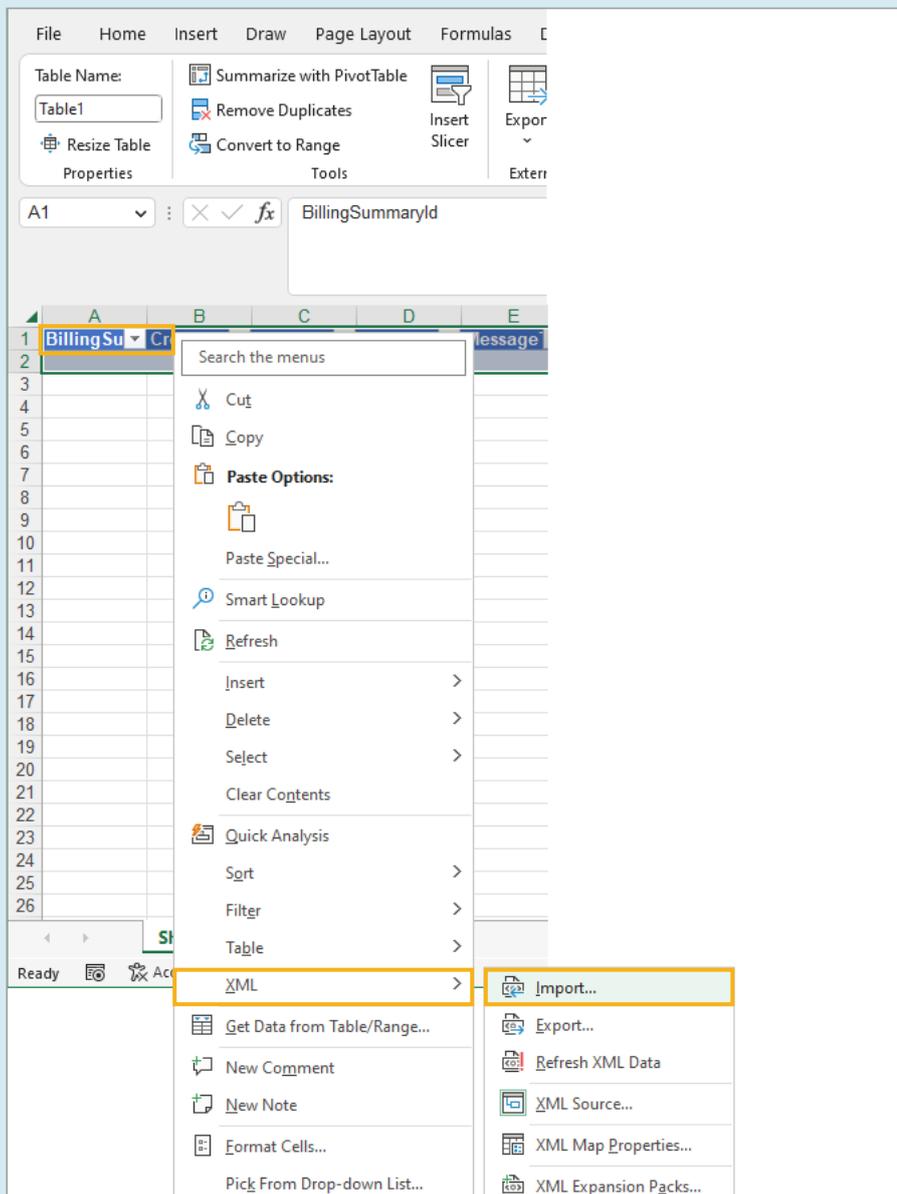
Once you have completed the above, you can save the template for future use, which means you won't have to repeat steps 1-7.

In steps 8-10, we will show you how to bring the data contained in future XML invoices into the template created in the above steps.

Note: If you have saved the template as per steps 1-7 going forward you will need to open the template you have just created prior to carrying out the next steps for future XML invoices you receive.

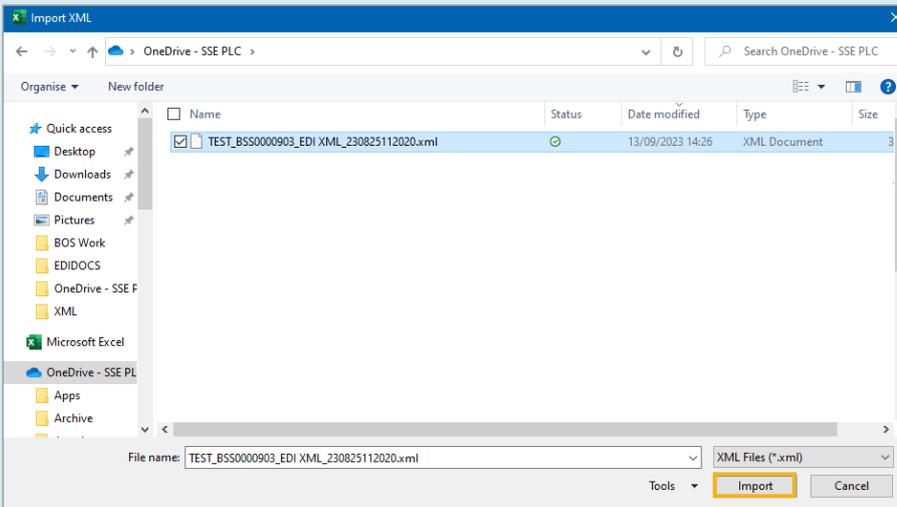
Step 8

Right-click on any column header on the left-hand side of the Excel spreadsheet. Then go to XML → Import and click on 'Import' as shown below:



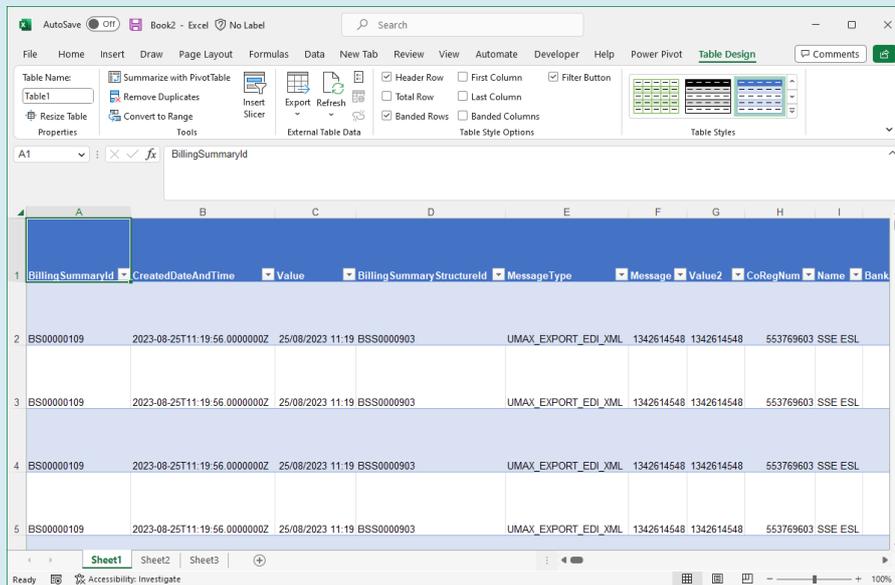
Step 9

Browse the new XML file you want to open and click on 'Import' to continue.



Step 10

You will now see your data in the Excel file.



At this point, the file can either be saved for future reference or closed.

You've now created your Excel