# **Import Call/ Sweep Transaction**

See previous W5 version guide

#### **PURPOSE**

This document shows how to import call/ sweep transactions in the CS Lucas system.

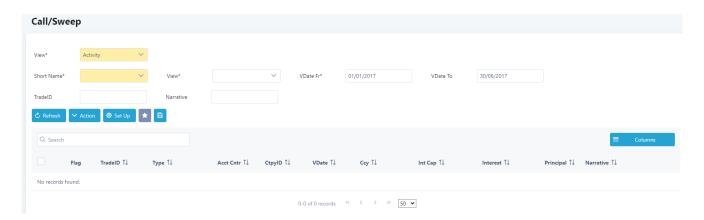
#### WHY IS THIS IMPORTANT?

This allows call/ sweep transactions to be imported into the system in bulk especially when users need to migrate their existing transactions into the system for a start.

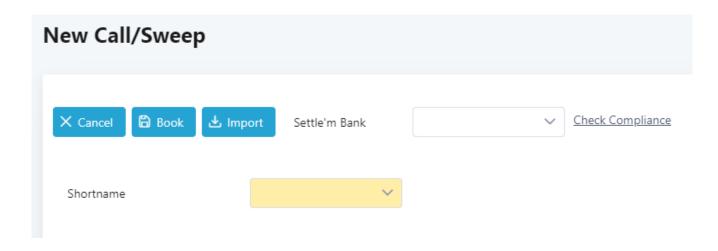
#### **PROCEDURE**



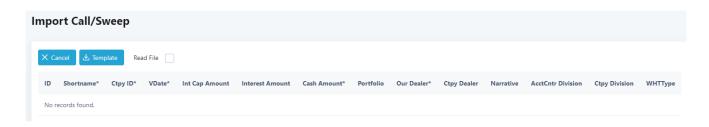
1. From the main menu, select Transaction > Call/Sweep.



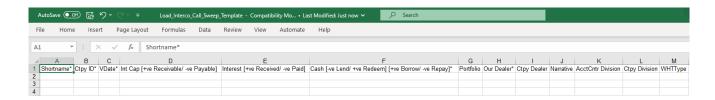
2. Click on Action and select New. The following screen will be displayed.



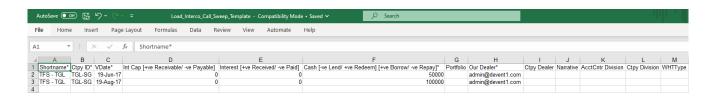
3. Click Import. The import screen will be displayed.



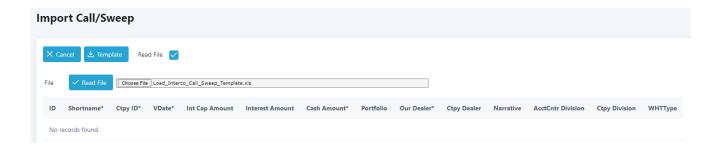
4. Click Template. An Excel file will be downloaded.



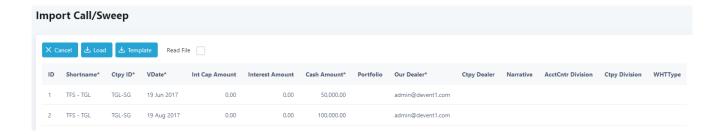
5. Fill out the fields in the Excel file. Those with asterisk (\*) are mandatory. In this example, only the mandatory fields are filled out.



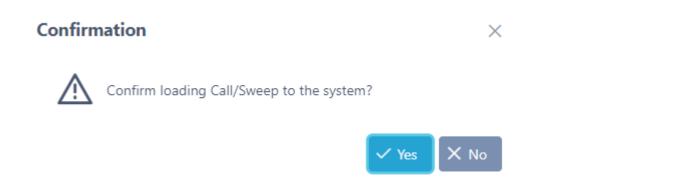
- 6. Save the Excel file on the computer.
- 7. From the Import Call/ Sweep screen, tick on Read File checkbox. Then, click Choose File. Look for the saved Excel file.



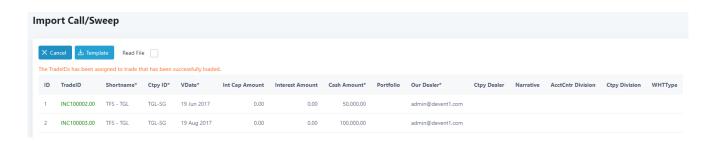
- 8. Click Read File.
- 9. If there is an error, go back to the Excel template and make the necessary changes then Read File again.
- 10. If no error, the page will be displayed like below.



11. Click Load. When a popup appears, click Yes.



12. A message that it was successfully loaded will be displayed. Transactions loaded will be assigned with Trade IDs.



### **FREQUENTLY ASKED QUESTIONS**

## **RELATED INFORMATION**

Call/Sweep Set Up

Call/ Sweep Transaction

## **CHANGE HISTORY**

Date	Ву	Changes
7-Jul-2017	Clarissa	Created.
21-Nov-2019	Lуга	Updated screenshots.
11-May-2023	TS	Updated to W6 instructions and screenshots.