

Importing spreadsheet data

In list mode of an solution click the Package import icon.

Columns in the import file will be matched to fields in the active solution. Preferably system field names should be used, as these are guaranteed to be unique. A template for the data can easily be built by selecting the "System export" option during export of existing data.

The result of an import operation is another CSV with response on each line in the file, either

- SUCCESES
- FAILED [reason why]

In case of inserts an DataID column is also added to the response.

Tip: In case some lines fail. Just remove the lines with SUCCESES, correct the faulty ones and try again after saving changes to the response file.

New data (insert)

New records will be created in accordance with matched fieldnames in the file. Missing values will be set to either the field default value or simply declared empty.

The presence of "DataID" column will make the import fail (countermeasure again human errors during imports).

Changes to existing data (update)

Existing records will be mached using one of the following methods

- Lookup by column named "DataID" in the import file
- Match by database lookup of all fields marked with "Is part of a unique key"

On the matching columns present in the file will be updated. Unmatched values will simply hold on to the value they had in the latest revision.

How to import data

When importing a file you can either update or insert records.

After the import is handled a file containing the results are returned to the user.

General rules using the import

- Validation rules apply by default (**Disable validation**)
- Codeunits are triggered by default (**Disable codeunits**)
- Field system names are used by default (**Allow field display names**)

Field names

Field names should use the system format (uppercase without any special characters), but it is possible to allow display name during imports (**Allow field display names**). An easy way to get the file format right is to export a couple of records and choosing **System format**.

DataID plays a special role in regard to what you want to do

- When creating data the DataID may NOT be included
- When updating data a valid DataID MUST be applied

Field values

Generally values must abide by the same restrictions as during form interaction.

- Validation
- Dependency

In case of lookup or relational fields just insert the value displayed (not the ID). A failure to match a value will result in that record being imported/updated.

It is however possible to skip the handling of fields on certain records by

- Leaving the value empty
- Checking the import option **Ignore empty values**

Troubleshooting

Complete failure to import can be caused by

- Used field name display values
- Forgot DataID column in an update

- Included DataID column in an insert

Errors in single records could be caused by

- Some required fields are missing
- Status field was left empty
- Values in lookup fields are misspelled

Errors during import will be documented in detail in the backend Events.

Revision #2

Created 8 April 2025 10:50:38 by Theis Villumsen

Updated 8 April 2025 13:24:02 by Theis Villumsen