

BULK IMPORT

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Features, Requirements & Security

New Features

- **Built in Drop Down Lists** - Included on the template for drop down, lookup, radio buttons and checkbox fields.
- **Required Fields** - Will be indicated with a Red Asterisk after the field name.
- **Ability to Remove Columns** - Often, a database can have many columns only a portion of which are needed in the initial import. Any columns not being used for the initial import can be removed from the template except for TableRecordID, OwnerEmail and ParticipantGroupName.

Template Requirements & Security

- **TableRecordID and OwnerEmail** - These are system fields that are always required to be on the spreadsheet. During an import the system will render an error message if uploaded without these two fields.
- **ParticipantGroupName** - This is a system field that is required if Participant Groups are turned on for the Organization. The import will render an error message if uploaded without this field.
 - **Note:** If Participant Groups are turned on the empty template downloaded will include this field.
- **User Friendly Column Names** - The top two rows need to be on the template in order for the import to work. Row one has the database field names and the second row on the template will be the "user friendly" label names. Occasionally, database table field names can differ from the label names. Therefore, we have added both rows for easy identification.
- **Moderator Edit and Moderator View Fields** - All fields will be displayed on the template. Participants will not be able to import into fields that are "Moderator Edit" or "Moderator View Only". Any data entered by a participant will be ignored.

New Link and Form

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Bulk Import

Step 1 of 3
Select the Database Table you wish to update. Next, download the Excel import template below and enter your data. You will upload your saved Excel spreadsheet in step 2.

Database Table

Template Style Empty Template

Template [Click here to download the template for Easy Issue Tracking](#)

Step 2 of 3
Upload the template here.

Upload Template No file chosen

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[\[Add a New Issue\]](#)
[\[Export Records\]](#) [\[Import Records\]](#) [\[Bulk Import\]](#)
[\[Quick Edit\]](#) [\[Quick Discussion Post\]](#)

Category	Issue


Download Import Template

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1. Click on the [Bulk Import] link
2. Select Database Table if applicable.
The database table default will be the parent table. If there is a table relation set up, you will be able to select a child table from the drop down list. If you want to import to a child table, you will need to select that table in order to download the correct template.
3. Download the "Import Template" in step 1

[Add a New Issue]
[Export Records] [Import Records] [Bulk Import] [Bulk Update]
[Quick Edit] [Quick Discussion Post] [Delete Records]

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Bulk Import



Step 1 of 3
Select the Database Table you wish to update. Next, download the Excel import template below and enter your data. You will upload your saved Excel spreadsheet in step 2.

Database Table

Template Style

template [Click here to download the template for Participant Group Quote Child Record Relation](#)

Step 2 of 3
Upload the template here.

Upload Template No file selected.

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Site Time: 12/14/2016 12:59 PM

Fill Out The Template

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1. Fill out the template by putting one item on each row
2. Make sure to fill in the "Owner Email" field with your user login email address.
3. Save template to PC

Note: Columns not needed for import can be removed except for the following: TableRecordID, OwnerEmail and ParticipantGroupName.

- TableRecordID (Column 1), and OwnerEmail (Column 2) are always required fields and must always be on the spreadsheet in the first two columns.
- ParticipantGroupName (Column 3) is a required field if the organization is using this feature. If Participant Groups are turned on, when the spreadsheet is downloaded, the field will be displayed in the 3rd column and should not be removed from the spreadsheet.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	TableRecordID	OwnerEmail	ChannelStores	ChannelCom	QuoteValidFrom	QuoteValidTo	Season	Department	Category	Theme	Buyer	Vendor	VendorNumber	NewUpdate
2	TableRecordID	OwnerEmail	Stores Channel	.Com Channel	Quote Valid From	Quote Valid To	Season	Department	Category	Theme	Buyer	Vendor	Vendor Number	New Update Ongoing
3		designsrus@grovesite.com	Unchecked	Checked	2/2/20	12/14/15 2017	Summer	105 Furniture	Accessories	Casual Fusion	Teri Thiem	Designs r Us	19909	New
4		designsrus@grovesite.com	Checked	Checked	3/31/15	6/30/15 2017	Summer	210 Lighting	Lighting	Casual Fusion	Teri Thiem	Designs r Us	19909	New


	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	TableRecordID	OwnerEmail	ParticipantGroupName	ChannelStores	ChannelCom	QuoteValidFrom	QuoteValidTo	Season	Department	Category	Theme	Buyer	Vendor	VendorNumber	NewUpdate
2	TableRecordID	OwnerEmail	ParticipantGroupName	Stores Channel	.Com Channel	Quote Valid From	Quote Valid To	Season	Department	Category	Theme	Buyer	Vendor	Vendor Number	New Update Ongoing
3		designsrus@grovesite.com	Designs R Us	Unchecked	Checked	2/2/20	12/14/15 2017	Summer	105 Furniture	Accessories	Casual Fusion	Teri Thiem	Designs r Us	19909	New
4		designsrus@grovesite.com	Designs R Us	Checked	Checked	3/31/15	6/30/15 2017	Summer	210 Lighting	Lighting	Casual Fusion	Teri Thiem	Designs r Us	19909	New

Upload Template

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1. Click on the [Bulk Import] link again
2. Click on the “Browse” button in step 2 and select your saved file
3. Click Upload template


[\[Add a New Issue\]](#)
[\[Export Records\]](#) [\[Import Records\]](#) [\[Bulk Import\]](#) [\[Bulk Update\]](#)
[\[Quick Edit\]](#) [\[Quick Discussion Post\]](#) [\[Delete Records\]](#)

Product Development **Bulk Import** 

Step 1 of 3
Select the Database Table you wish to update. Next, download the Excel import template below and enter your data. You will upload your saved Excel spreadsheet in step 2.


Database Table

Template Style Empty Template

Template  [Click here to download the template for Product Quote w Sample](#)

Step 2 of 3
Upload the template here.

[Upload Template](#) No file selected.

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Import Review Screen

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1. Review import records in step 3 and click “Finish”
2. Uncheck any records that you do not want to process
3. Click Close to complete import

Product Development Bulk Import



Step 3 of 3

- Review your records below: Note that if you are updating existing records, the columns and data shown will **overwrite any previous data**.
- Uncheck records that you do not want to process.
- When you are finished reviewing, scroll to the bottom of form and click **Finish**.

	TableRecordID	OwnerEmail	-view-	QuoteValidFrom	QuoteValidTo	Season	Department	Category	Theme	Buyer	Vendor	VendorNumber	NewUpdate
<input checked="" type="checkbox"/>	0	designsrus@grovesite.com		4/22/2015 12:00:00 AM	9/18/2015 12:00:00 AM	2017 Summer	310 Outdoor	Accessories	Casual Fusion	Teri Thiem	Jan Handle Deluxe	8989	New
<input checked="" type="checkbox"/>	0	designsrus@grovesite.com		4/1/2015 12:00:00 AM	7/24/2015 12:00:00 AM	2017 Summer	310 Outdoor	Accessories	Casual Fusion	Teri Thiem	Jan Handle Deluxe	8001	Update
<input checked="" type="checkbox"/>	0	designsrus@grovesite.com		3/31/2015 12:00:00 AM	6/30/2015 12:00:00 AM	2017 Summer	210 Lighting	Lighting	Casual Fusion	Teri Thiem	Designs r Us		New

Error Message Key

- * Record id not found in page
- ** Parent Record id not found in page
- *** Record has existing data that will be cleared by update. Check box to continue to update or leave unchecked to ignore update.

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Step 3

Summary of this import

Rows Added: 3

Rows Updated: 0

Rows Skipped by User: 0

Rows with Errors:

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