Import - Overview

Overview

Importing is an efficient way of migrating a large amount of data into the system and streamlining your data. The Import tool provides you the capability of transferring data to the system from a spreadsheet instead of entering each item manually.

The Import tool uses the information in an import file (CSV file) to:

- Insert - create new records
- Update - replace or edit existing information

Understanding a CSV File

CSV stands for "comma-separated values" and a simple file format for spreadsheets or databases.

CSV files are considered flexible and using them is an effective way of importing large amount of data. CSV files have the capability to hold tabular data (i.e. alphanumeric data) in plain-text form.

You can create CSV files by using a spreadsheet software (e.g. Excel, Numbers, OpenOffice).

Before you begin

It is important to follow the guidelines below before you prepare your import file and import it to ensure that your file will import successfully:

- The import file must be in .CSV format.
- The file should have column headings in the first row.
- Required/mandatory fields should have a value.
- The import file must contain no more than 2,000 rows per import.

NEXT: Preparing the Import File

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