



Excel Import App

User Guide

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1. Introduction

SharePoint Excel Import App allows business users to import any Excel spreadsheet (.xlsx, .xls, or .csv file) into a SharePoint Online list and map data fields manually or automatically.

Using Excel Import App, users can import data to most built-in types of SharePoint columns, including Single Line of Text, Multiple Lines of Text, Choice, Number, Date and Time, Currency, People or Group, Lookup, Yes/No and Hyperlink or Pictures.

This user guide is used to instruct user on how to use this app.

For the latest copy of this and other guides, please visit:

<http://www.boostsolutions.com/download-documentation.html>

2. How to Use Excel Import App

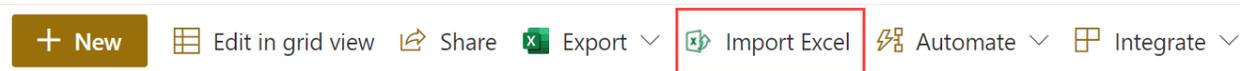
2.1 Import a Spreadsheet

To import a Spreadsheet, you must have at least **Add Items** and **Edit Items** permissions in the list or be a member of the SharePoint Online group who has **Add Items** and **Edit Items** permissions in the list.

- Enter the list that you want to import a spreadsheet into. (Enter the specific folder, you can import a spreadsheet to the folder.)



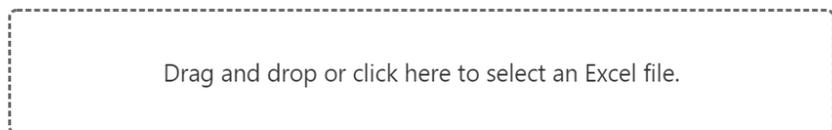
- Click **Import Excel** in the top action bar. (Import Excel is unavailable in classic SharePoint experience.)



- In the **Excel Import** dialog box, in **Import from Spreadsheet** section, drag the Excel file you intend to import to the dotted box area (or click **Drag and drop or click here to select an Excel file** to choose an Excel or CSV file).

Import from Spreadsheet

Specify the location for the spreadsheet you want to use as the basis for this list.



- Once the Excel file is uploaded, the sheets included will be loaded and available for import. In the **Sheet** section, select a sheet which you want to import.

Use the Option **Skip header row in Excel** to decide whether or not to import the first row. This option is enabled by default and can be manually disabled if you don't have field titles in the first row or if you do not want to use the first row as field titles.

Sheet

Select one sheet which you want to import.

Skip header row in Excel

- e. In the **Column Mapping** section, select the columns in Excel and map them to list columns.

By default, the columns with the same name will be automatically mapped whenever a sheet is loaded. Additionally, required columns will be marked with a red asterisk and selected automatically.

Column Mapping

Specify column mapping between Excel Sheet and the list.

List Columns:

Order ID*

Customer

Product

Purchased Date

Unit Price

Quantity

Paid or not

Saler

Excel Columns:

- f. In the **Filter** section, select the data range and import the data you need. If you deselect this option, all rows in the Excel sheet will be imported.

Filter

Enter the row range of selected Excel Sheet to import. If not checked, all rows will be imported.

Import from to (Total rows:11)

If you select the checkbox next to **Import from [] to []** option, and specify the data range such as from row 2 to 8, then only the specified rows will be imported to the list.

Filter

Enter the row range of selected Excel Sheet to import. If not checked, all rows will be imported.

Import from to (Total rows:11)

- g. In the **Import Options** section, specify if you want to update SharePoint list using an Excel file.

For first-time import, it is unnecessary to select this option.

Import Options

Specify whether you want to check for duplicates when importing. A "key column" is one that uniquely identifies records between Excel and SharePoint list. Note: This option will only affect duplicate records, and unduplicated records will be added to this list.

Check duplicate records when importing

Keys

What action should be taken if duplicates found?

Skip duplicate records

Update duplicate records

(Duplicate records will be skipped if key column is not unique)

But if you have already imported data before, you may need to decide what action should be taken if duplicates are found when importing Excel to SharePoint.

Before doing this, you need to enable the **Check duplicate records when importing** option.

Duplicate records can exist in both SharePoint list and Excel Sheet. In order to check duplicate records, a **Key** has to be specified to identify duplicate records.

A key column is one that uniquely identifies records between Excel and SharePoint list (like an ID column). You can specify more than one key columns.

Note

Only columns which have been selected in the Column Mapping section can be utilized as a key column.

These columns can be set as Key columns: Single line of text, Choice, Number, Date and Time, Currency and Yes/No.

Import Options

Specify whether you want to check for duplicates when importing. A "key column" is one that uniquely identifies records between Excel and SharePoint list. Note: This option will only affect duplicate records, and unduplicated records will be added to this list.

Check duplicate records when importing

Keys

Order ID, Purchased Date

What action should be taken if duplicates found?

Skip duplicate records

Update duplicate records

(Duplicate records will be skipped if key column is not unique)

Once the **Check duplicate records when importing** option is enabled, there are two actions that can be taken if any duplicates are found when importing Excel to list.

- **Skip duplicate records**

Excel Import App compares values of key column in Excel and SharePoint Online list, if the values are same on both sides, the records will be identified as duplicate.

Data which has been identified as duplicate records in an Excel spreadsheet will be skipped when importing and only the unique records remaining will be imported.

- **Update duplicate records**

Excel Import App compares values of Key column in Excel and SharePoint Online list, if the values are same on both sides, the records will be identified as duplicate.

For the duplicate records, Excel Import App will update information in the duplicate records in the SharePoint Online list with the corresponding information in the Excel spreadsheet. Then, the remaining data of spreadsheet will be regarded as new records and imported accordingly.

Note

If the key column is not unique in Excel or list, the duplicate records will be skipped.

For example, supposed you have set the **Order ID** column as key:

If there are multiple records in Excel with the same value of **Order ID** column, these records will be identified as duplicate and skipped.

If there are multiple records with the same value of **Order ID** column in list, the records in the list will be identified as duplicate and skipped.

- h. And then click the **Import** button.
- i. After the importing process finished, you can see the import results as following. Click the **Close** button to exit.

Excel Import ✕

Complete

10 records have been processed.

Succeeded: 10, Skipped: 0, Failed: 0

Close

- j. The in the list, you will find that all the records of Excel file have been imported into the list as following.

Order ID	Customer	Product	Purchased Date	Unit Price	Quantity	Paid or not	Saler
ORD-4521001	Diff Inc	ADS	1/20/2021	\$1,000.00	1	✓	Adele Vance
ORD-4521002	Anton	ADA	1/25/2021	\$980.00	1	✓	Alex Wilber
ORD-4521003	Dottm	DOCSHARE	1/28/2021	\$850.00	2	✓	Lee Gu
ORD-4521004	KADANT	DOCVIEW	2/3/2021	\$790.00	2	✓	Grady Archie
ORD-4521005	A&C	ADIS	2/12/2021	\$1,050.00	1	✓	Adele Vance
ORD-4521006	Keep, Inc.	PRINTER	2/25/2021	\$1,200.00	1		Alex Wilber
ORD-4521007	Shareit Co, Inc.	DOCSHARE	2/26/2021	\$850.00	2		Lee Gu
ORD-4521008	CAST	DOCVIEW	3/2/2021	\$790.00	2	✓	Grady Archie
ORD-4521009	ABB	PRINTER	3/8/2021	\$1,200.00	1		Alex Wilber
ORD-4521010	Lydell	ADS	3/16/2021	\$1,000.00	1	✓	Lee Gu

2.2 Supported SharePoint Column Types

Most popular SharePoint columns are supported by Excel Import App, including Single Line of Text, Multiple Lines of Text, Choice, Number, Date and Time, Currency, People or Group, Lookup, Yes/No and Hyperlink or Pictures. You can map Excel columns to these SharePoint columns when importing an Excel file.

However, for some column types, there are some tips you need to take care of:

Choice

Choice column is a built-in SharePoint Online column with predefined values, to import values into this column type, you need to check and make sure the value and case are same in Excel and list.

To import multiple values into a Choice column, the values should be separated by comma ",".

For example, the values of **Category** column must be separated by "," as following, then they can be imported successfully.

A	B	C	D	E	F
Work Item	Category	Progress	Priority	Start Date	Due Date
Prototype design	Planning,Research	Completed	Critical	September 12, 2021	September 22, 2021
UI design	Design,Research	Completed	High	September 20, 2021	September 30, 2021
Iteration 1	Engineering	Completed	Medium	September 30, 2021	October 15, 2021
Iteration 2	Engineering	In progress	Low	October 15, 2021	October 30, 2021
Iteration 3	Engineering	Not started	Critical	October 30, 2021	November 15, 2021
Iteration 4	Engineering	Not started	High	November 15, 2021	November 30, 2021
Iteration 5	Engineering	Not started	Medium	November 30, 2021	December 15, 2021
Product acceptance	Engineering	Not started	Low	December 15, 2021	December 20, 2021
Launch	Marketing,Planning	Not started	Low	December 20, 2021	December 5, 2021
Promote	Marketing,Planning	Not started	Low	December 5, 2021	December 30, 2021

Work Items Tracker ☆

Work item ▾	Category ▾	Progress ▾	Priority ▾	Start date ▾
🚩 Prototype design	📅 Planning 🔍 Research	Completed	⊗ Critical	September 12
🚩 UI design	👉 Design 🔍 Research	Completed	↑ High	September 20
🚩 Iteration 1	↗ Engineering	Completed	Medium	September 30
🚩 Iteration 2	↗ Engineering	In progress	↓ Low	October 15
🚩 Iteration 3	↗ Engineering	Not started	⊗ Critical	October 30
🚩 Iteration 4	↗ Engineering	Not started	↑ High	Today
🚩 Iteration 5	↗ Engineering	Not started	Medium	November 30
🚩 Product acceptance	↗ Engineering	Not started	↓ Low	December 15
🚩 Launch	✉ Marketing 📅 Planning	Not started	↓ Low	December 20
🚩 Promote	✉ Marketing 📅 Planning	Not started	↓ Low	December 5

Lookup Column

To import value to a SharePoint Lookup column, it requires the value be a text or a number. It means selected column of **In this column** should be a Single line of text or Number column.

Get information from:

Cases

In this column:

Case ID ▾

Allow multiple values

If you plan to import multiple values into a Choice column, the values should be separated by “;”.

For example, the values of **Related Cases** column must be separated by “;” as following, then they can be imported to a Lookup column successfully.

A	B	C	D
Case ID	Case Status	Assigned To	Related Cases
CAS-12T2DF-001	Closed	Alex Wilber	CAS-12T2DF-006
CAS-12T2DF-002	Closed	Megan Bowen	CAS-12T2DF-005;CAS-12T2DF-014
CAS-12T2DF-003	Closed	Lynne Robbins	CAS-12T2DF-001
CAS-12T2DF-004	Closed	Adele Vance	
CAS-12T2DF-005	Deferred	Adele Vance	
CAS-12T2DF-006	Cancel	Alex Wilber	CAS-12T2DF-003;CAS-12T2DF-014
CAS-12T2DF-007	Cancel	Lynne Robbins	
CAS-12T2DF-008	Deferred	Adele Vance	CAS-12T2DF-005;CAS-12T2DF-014
CAS-12T2DF-009	Closed	Alex Wilber	
CAS-12T2DF-010	Closed	Lynne Robbins	
CAS-12T2DF-011	Closed	Adele Vance	
CAS-12T2DF-012	Open	Alex Wilber	CAS-12T2DF-006
CAS-12T2DF-013	Open	Adele Vance	
CAS-12T2DF-014	Open	Adele Vance	CAS-12T2DF-005;CAS-12T2DF-008;CAS-12T2DF-014

Cases ☆

Case ID ▾	Case Status ▾	Assigned To ▾	Related Cases ▾
🚩 CAS-12T2DF-001	Closed	Alex Wilber	CAS-12T2DF-006
🚩 CAS-12T2DF-002	Closed	Megan Bowen	CAS-12T2DF-005 CAS-12T2DF-014
🚩 CAS-12T2DF-003	Closed	Lynne Robbins	CAS-12T2DF-001
🚩 CAS-12T2DF-004	Closed	Adele Vance	
🚩 CAS-12T2DF-005	Deferred	Adele Vance	
🚩 CAS-12T2DF-006	Cancel	Alex Wilber	CAS-12T2DF-003 CAS-12T2DF-014
🚩 CAS-12T2DF-007	Cancel	Lynne Robbins	
🚩 CAS-12T2DF-008	Deferred	Adele Vance	CAS-12T2DF-005 CAS-12T2DF-014
🚩 CAS-12T2DF-009	Closed	Alex Wilber	
🚩 CAS-12T2DF-010	Closed	Lynne Robbins	
🚩 CAS-12T2DF-011	Closed	Adele Vance	
🚩 CAS-12T2DF-012	Open	Alex Wilber	CAS-12T2DF-006
🚩 CAS-12T2DF-013	Open	Adele Vance	
🚩 CAS-12T2DF-014	Open	Adele Vance	CAS-12T2DF-005 CAS-12T2DF-008 CAS-12T2DF-014

Person or Group Column

To import names to a SharePoint Person or Group column, the user's name in Excel should be a login name, display name or email address; if you need to import multiple values to this column, the values should be separated by “;”.

For example, the display name or email address as shown in the figure below can be successfully imported into the Person or Group Column.

A	B	C	D	E	F	G	H
Order No.	Customer	Product	Purchased Date	Unit Price	Quantity	Paid or Not	Salers
ORD-4521001	Diff Inc	ADS	1/20/2021	1000.00	1	Yes	Adele Vance
ORD-4521002	Anton	ADA	1/25/2021	980.00	1	Yes	Alex Wilber
ORD-4521003	Dottm	DOCSHAR	1/28/2021	850.00	2	Yes	Lee Gu;Alex Wilber
ORD-4521004	KADANT	DOCVIEW	2/3/2021	790.00	2	Yes	Grady Archie
ORD-4521005	A&C	ADIS	2/12/2021	1050.00	1	Yes	AdeleV@bsmark.onmicrosoft.com
ORD-4521006	Keep, Inc.	PRINTER	2/25/2021	1200.00	1	No	Alex Wilber
ORD-4521007	Shareit Co.	DOCSHAR	2/26/2021	850.00	2	No	Lee Gu; Adele Vance
ORD-4521008	CAST	DOCVIEW	3/2/2021	790.00	2	Yes	Grady Archie
ORD-4521009	ABB	PRINTER	3/8/2021	1200.00	1	No	Alex Wilber
ORD-4521010	Lydell	ADS	3/16/2021	1000.00	1	Yes	Lee Gu

Orders ☆

Order ID	Customer	Product	Purchased Date	Unit Price	Quantity	Paid or not	Saler
ORD-4521001	Diff Inc	ADS	1/20/2021	\$1,000.00	1	✓	Adele Vance
ORD-4521002	Anton	ADA	1/25/2021	\$980.00	1	✓	Alex Wilber
ORD-4521003	Dottm	DOCSHARE	1/28/2021	\$850.00	2	✓	Lee Gu Alex Wilber
ORD-4521004	KADANT	DOCVIEW	2/3/2021	\$790.00	2	✓	Grady Archie
ORD-4521005	A&C	ADIS	2/12/2021	\$1,050.00	1	✓	Adele Vance
ORD-4521006	Keep, Inc.	PRINTER	2/25/2021	\$1,200.00	1		Alex Wilber
ORD-4521007	Shareit Co, Inc.	DOCSHARE	2/26/2021	\$850.00	2		Lee Gu Adele Vance
ORD-4521008	CAST	DOCVIEW	3/2/2021	\$790.00	2	✓	Grady Archie
ORD-4521009	ABB	PRINTER	3/8/2021	\$1,200.00	1		Alex Wilber
ORD-4521010	Lydell	ADS	3/16/2021	\$1,000.00	1	✓	Lee Gu

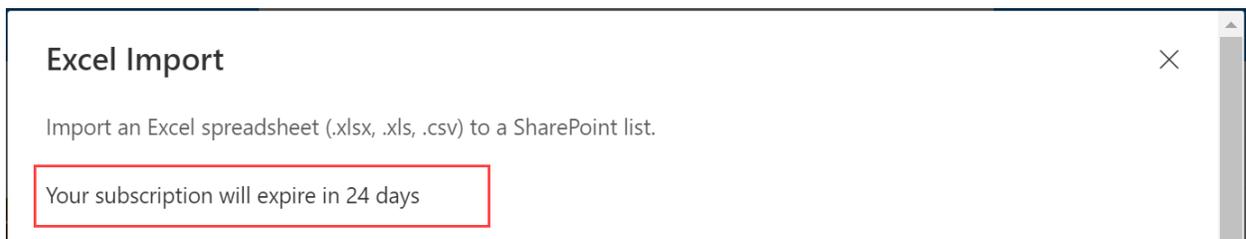
Appendix 1: Subscription Management

You can use Excel Import App trial subscription for a period of 30 days since the day you first use it.

If the trial subscription period ends, you will need to buy a subscription. The subscription of Excel Import App is per site (previously called "site collection") annually.

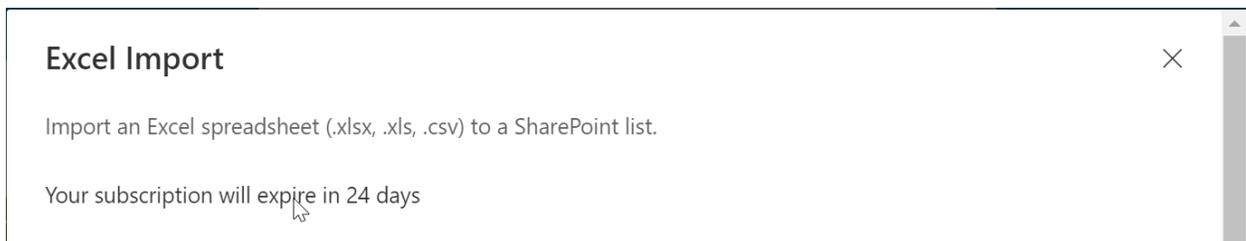
Checking Subscription Status

- a. When you open **Excel Import** dialog, the subscription status will be shown on the top of the dialog. When the subscription is about to expire within 30 days, the notification message will always show the days left.

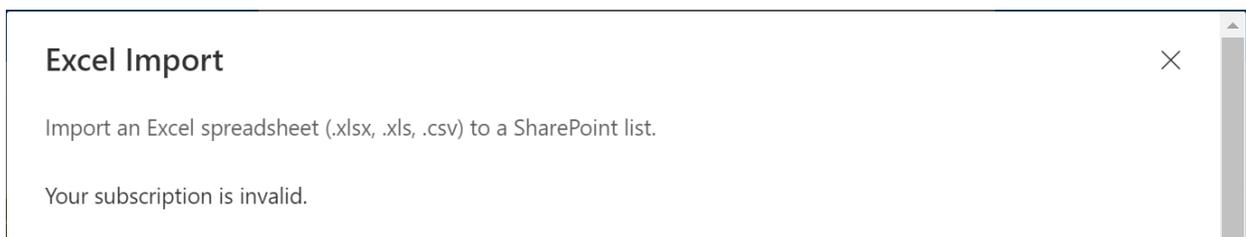


- b. To update the subscription status, please put the mouse on the notification message and click it, then the new status will be loaded.

If the subscription status does not change, please clear the cache of browser and click again.



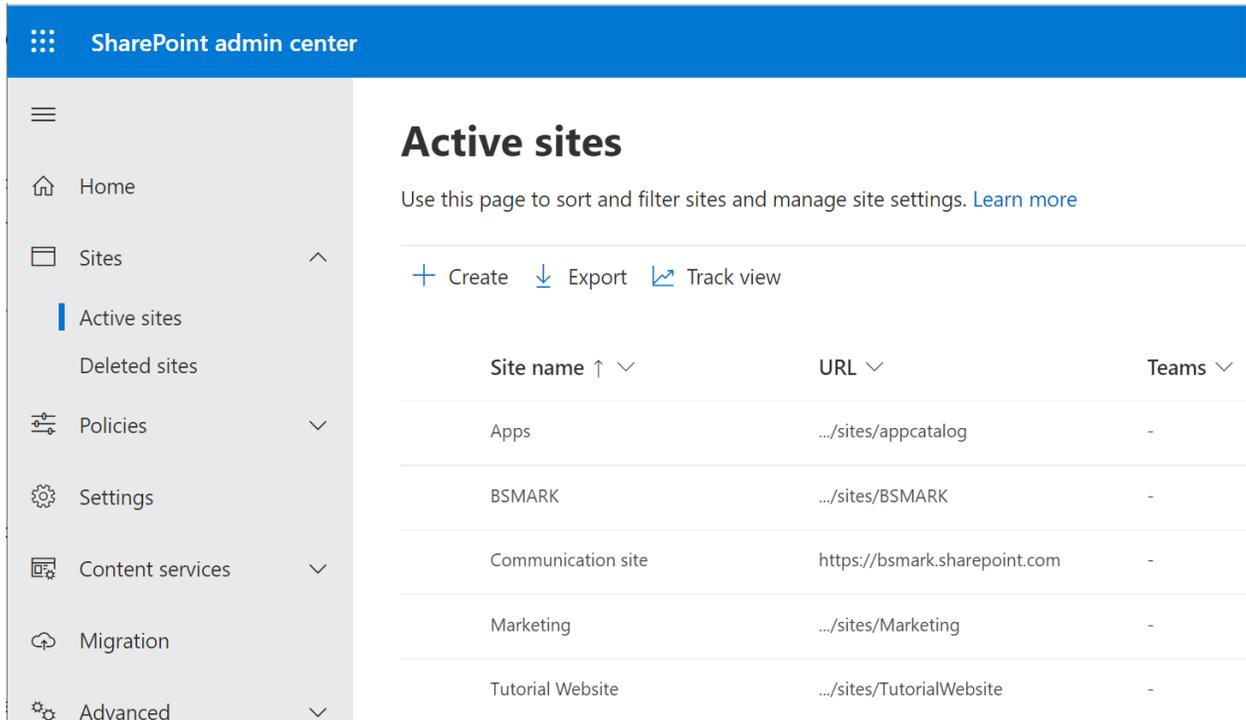
- c. Once the subscription status turns to **Your subscription is invalid** as following, it means that your subscription has expired.



- d. Please send us (sales@boostsolutions.com) the site URL to proceed a subscription or renewal.

Finding Site Collection URL

- a. To get site (previously called site collection) URL, please go to the **Active sites** page of the new **SharePoint admin center**.



The screenshot shows the SharePoint Admin Center interface. The left sidebar contains navigation options: Home, Sites (expanded), Active sites (selected), Deleted sites, Policies, Settings, Content services, Migration, and Advanced. The main content area is titled 'Active sites' and includes a sub-header: 'Use this page to sort and filter sites and manage site settings. [Learn more](#)'. Below this are action buttons: '+ Create', '↓ Export', and '↗ Track view'. A table lists active sites:

Site name ↑ ↓	URL ↓	Teams ↓
Apps	.../sites/appcatalog	-
BSMARK	.../sites/BSMARK	-
Communication site	https://bsmark.sharepoint.com	-
Marketing	.../sites/Marketing	-
Tutorial Website	.../sites/TutorialWebsite	-

- b. Click the site to open a window with site settings. In **General** tab, click **Edit** link and then you can get the site URL.

Marketing

General Activity Permissions Policies

Site name

Marketing

[Edit](#)

URL

[.../sites/Marketing](#)

[Edit](#)

If your site URL changes, please send us the new URL to update the subscription.