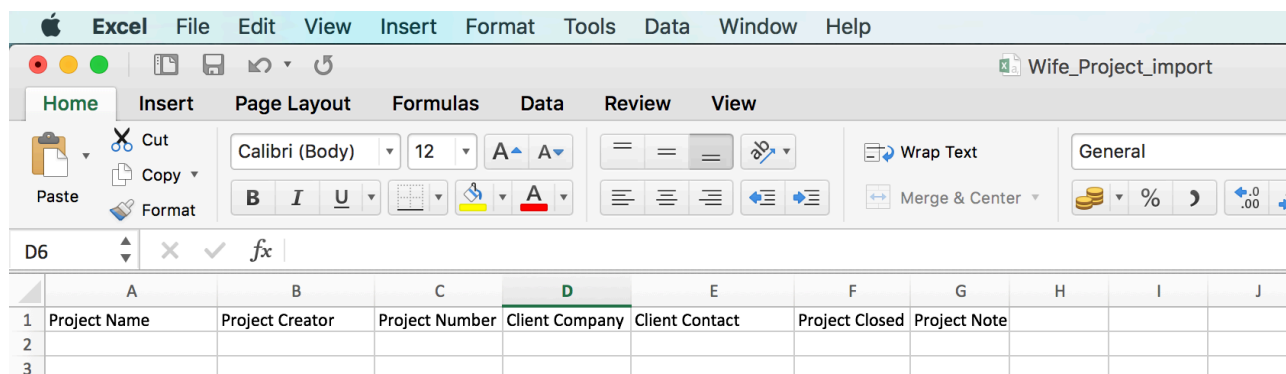


The **Import Projects** from CSV file functionality allows to import new Projects into farmers**wife**. Modifying existing Projects is not supported.

CSV Preparation

- Prepare a CSV (comma separated) file in a spreadsheet application like Microsoft Excel or Numbers on Mac or use a text editor.
- Each row in the CSV file will be imported and created as a Project in farmers**wife**.
- Add a first row with the Label names to easily map them to the farmers**wife** fields. This first row will not be imported as a Project.
- Here is an example of how it could look like:



- If using Microsoft Excel, save the file as "Windows Comma Separated" file.
- If you have trouble importing your file correctly (e.g. special characters not displayed properly), please try opening it using 'Numbers' on a Mac, instead of Excel. Then save the file through: Files > Export > CSV > Text Encoding: Unicode.

Available fields for mapping

- Client (contact first and last name)
- Closed (1 = closed, 0 = open)
- Invoice Note
- Name (Project Name)
- Note
- Number
- Creator
- Company
- Division
- All farmers**wife** Project custom fields

Clients

You can import projects without specifying a Client. When opening the imported Project the first time in farmers**wife**, it will prompt you to "Check Your Client. Project Must Match And Link To Existing Client." Click on the field Client and select an existing client or create and add a new one.

If a client is specified in the Project import file, then the client needs to exist already in farmers**wife**. Map the company name to the farmers**wife** Project field 'Client' and the contact name (first and last name) to the farmers**wife** Project field Contact.

Project number

Projects must have unique numbers in farmers**wife**. When importing, Project numbers can be specified in the import file. If the specified number is not unique, because there is already a Project with the same number in farmers**wife**, the import will still work and the imported Project will get the duplicated number assigned. When opening the imported Project the first time in farmers**wife**, the system will automatically replace the duplicated Project number with the next highest available Project number in the system.

Date Widgets

Use the format dd/mm/yyyy. Make sure Excel doesn't reformat automatically the values. Open the csv file in a text editor if the date format needs to be edited because text editors do not apply automatic formatting.

Checkbox widgets

1= flagged, 0 = not flagged, empty = tri-state

Import

- The import is done at farmers**wife** Server level. All Users need to log-out before entering the farmers**wife** Server Setup or they will be disconnected.
- Run a Full Backup before starting.
- Then go to farmers**wife** Server Setup > Projects. Find in the top left corner the button to **Import Projects**.
- Click on the button to **Import Projects**, browse to the prepared CSV file and open it.
- Select Separator Character.
- The Import Projects window opens, where you need to map the columns from the CSV file with the available Project fields in your farmers**wife** system. Those are the farmers**wife** Project standard and custom fields.
- The Import Projects window shows all column names from the first row of your prepared csv file. Click on the selector widget next to it to see all farmers**wife** Projects fields that are available for mapping.

- Finish the import by clicking OK.
- As the import is done, a new window will show how many Projects have been imported or updated.
- The option "Clear All When Importing" at the bottom right corner will **delete all existing Projects** in the database upon the import.
- "Save" and "Load" mappings as templates. With the option "Save" you can save the field mapping as a template in a folder on your computer, , to use the template for further Project imports with the option "Load".