

Import and export data Tips & Tricks

GRÉGORY DETHIER, FUNCTIONAL ANALYST

SUMMARY

1 Introduction

2 Import

3 Export

4 Google

5 Conclusion

DATA IMPORT



DATA IMPORT

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My company is moving to Odoo to better structure and automates my processes. Therefore I need to put data in Odoo to use them!

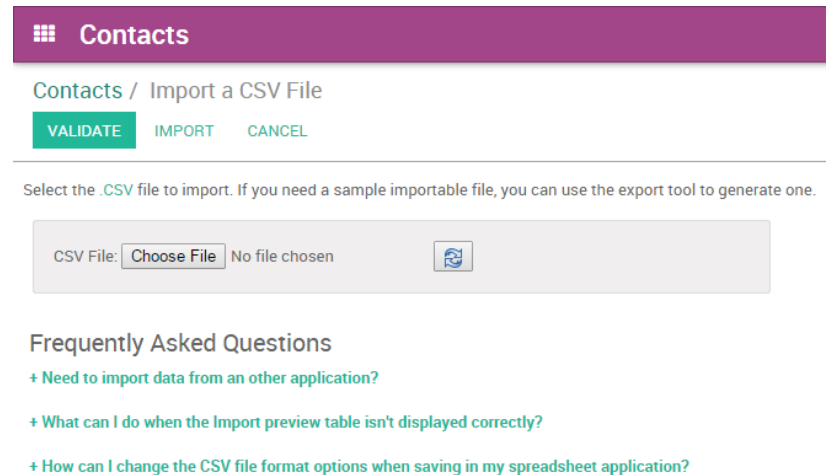
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Data import

- ✓ Check your file structure
- ✓ Preview of your file with mapping with Odoo fields
- ✓ Validation of the import

Create data

- ✓ Export to get file structure
- ✓ Use IDs or name to create links between objects
- ✓ Generate IDs by yourself



The screenshot shows the 'Contacts' module interface for importing a CSV file. At the top, there's a purple header with a grid icon and the text 'Contacts'. Below it, the breadcrumb 'Contacts / Import a CSV File' is visible. Three buttons are present: 'VALIDATE' (highlighted in green), 'IMPORT', and 'CANCEL'. A horizontal line separates the header from the main content. Below the line, a text instruction reads: 'Select the .CSV file to import. If you need a sample importable file, you can use the export tool to generate one.' Underneath is a file selection area with the text 'CSV File: Choose File No file chosen' and a small icon of a document with a plus sign. At the bottom, there's a section titled 'Frequently Asked Questions' with three expandable items: '+ Need to import data from an other application?', '+ What can I do when the Import preview table isn't displayed correctly?', and '+ How can I change the CSV file format options when saving in my spreadsheet application?'.

Update data

- ✓ Use of record IDs

DATA EXPORT



DATA EXPORT

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My company is using two software and I need to consolidate my data into an Excel file.

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DATA EXPORT

Export Data

This wizard will export all data that matches the current search criteria to a CSV file. You can export all data or only the fields that can be reimported after modification.
Please note that only the selected ids will be exported.

Export Type: Export Formats:

Available fields

- Logistical Units
- Main Supplier
- Measure Type
- Medium-sized image
- Messages
 - Name
 - Net Weight
 - Price
 - Pricelist
- Product Attributes
 - Product Manager
 - Product Type
- Products
 - Public Price
 - Purchase Description
 - Purchase Unit of Measure

Fields to export [Save fields list](#)

- Name
- Cost Price
- Public Price

Buttons: Add, Remove, Remove All, Move Up, Move Down

- ✓ Select the export type
- ✓ Select the format:
CSV or Excel
- ✓ Save fields list for
future use

Some Tips...

IMPORT

- Create your own Ids
- Specify Ids to update
- Use Ids instead of names
- Export a test record to get file structure

EXPORT

- Save your export for future use
- Use the export type to get more fields and go deeper in the relationships
- Export directly in Excel

Google Docs

Google docs



Google Doc Templates

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My company requires several additional information to be stored for my products but I don't want my screen to be too complex.

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Google Doc integration

Technical details

Technical data ☆

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€ % ,0_ .00 123 Arial 18 B I A

f_x | [PRODUCT NAME]

	A	B	C	D	E	F	G
1	[PRODUCT NAME]						
2							
3			Technical desc.				
4							
5	[PRODUCT] [PICTURE]		Size				
6			Weight				
7			Maintenance required ?				
8							
9							
10							
11							
12							
13							
14							
15							
16							
17							
18							
19							
20							
21							
22							
23							
24							
25							

Maintenance sheet

Technical data ☆

Fichier Édition Affichage Insertion Format Données Outils Modules complémentaires Aide Enregistre

€ % ,0_ .00 123 Arial 10 B I A

f_x | [PRODUCT NAME]

	A	B	C	D	E	F	G
1	[PRODUCT NAME]						
2							
3			Technical desc.				
4							
5	[PRODUCT] [PICTURE]		Size				
6			Weight				
7			Maintenance required ?				
8							
9							
10							
27	MAINTENANCE TABLE						
28	Date	Desc.				Responsible	Status
29							
30							
31							
32							
33							
34							
35							
36							
37							

Google Spreadsheet

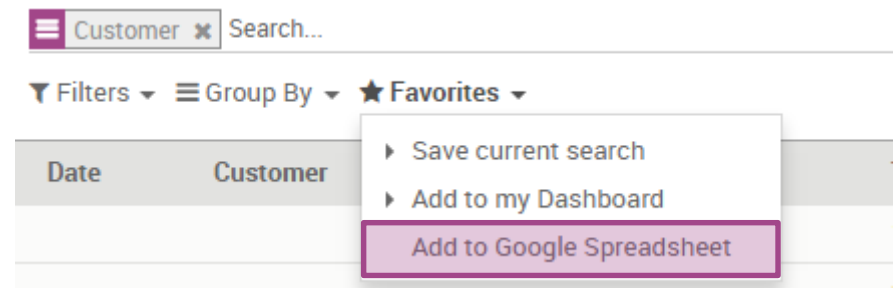
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As a manager, I need to get a global view of my activities from my different applications.

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Google Spreadsheet

- ✓ Get the data from Odoo pulled into a spreadsheet
- ✓ Real-time analysis
- ✓ Share info with colleagues
- ✓ Easy creation using filters and group by



Fichier Édition Affichage Insertion **Format** Données Outils Aide Toutes les modifications enregistrées dans

€ % 123 Arial 10 B I S A

f_x =oe_read_group("sale.order";"partner_id name date_order user_id amount_total state";"partner_id";"[]")

	A	B	C	D	E	F
1	Agrolait	0	0	0	14592	0
2	Bank Wealthy and sons	0	0	0	2947,5	0
3	Chamber Works	0	0	0	377,5	0
4	Luminous Technologies	0	0	0	14981	0
5	Millennium Industries	0	0	0	9555	0
6	Think Big Systems	0	0	0	750	0

Thank You

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