

# Export and Mass Update: Tips and tricks

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Introduction



Import



Export



Mass Update



Conclusion

# Data Import





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

# Data import

## Create Template

- ✓ Export to get file structure
- ✓ Use external IDs or name to create links between objects
- ✓ Use fields label or field name for the first row
- ✓ Check your file structure

## Import

- ✓ Preview of your file with mapping with Odoo fields
- ✓ Tick “Show all fields for completion (advanced)” to see all type of fields
- ✓ Validation of the import
- ✓ Import

# Data Export

## Create Template

- ✓ Select records in list view
- ✓ Select the field by label name (easily reorder them)
- ✓ Select the export type (to reach up to 3 relational levels)
- ✓ Select the format: CSV or Excel
- ✓ Save fields list for future use

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 pay attention that all records matching your search filter will be exported. Not only the selected ids.

Export Type :  Import-Compatible Export  Export all Data

Export Formats :  CSV  Excel

Available fields

Active  
Bounce  
Campaign  
City  
Color Index  
Company  
Contact Name  
Country  
Created by  
Customer  
Customer Name  
Email

ADD

REMOVE

REMOVE ALL

MOVE UP

Fields to export

[Save fields list](#)

Saved exports: Name & city

DELETED

Opportunity  
Contact Name  
City

# Tips and tricks

## Import

- Use preferably External IDs
- Export a test record to get file structure for this model
- For relation field, do a vlookup after exporting the other model ids
- To be able to link model => generate the external id of records by exporting them.
- Tick “Show all fields for completion (advanced)” to see all type of fields

## Export

- Save your export list for future use
- Use the export type to get more fields and go deeper in the relationships
- Export directly in Excel for analysis purpose
- You can export also pivot table into excel sheets

# Mass Update

## Export/import

- ✓ Select the records to update in list view
- ✓ Select the option “import-Compatible Export”
- ✓ Keep the first column with “ID”, if left blank it create a new record
- ✓ You can modify any fields
- ✓ Use Vlookup to link relation field and set the external ids (better)



Questions ?

Thank you.



#odooexperience