Excel Import App

User Guide

Copyright

Content

1.   Introduction

The 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.

With the Excel Import App, users can import data into 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.

Please note that the Excel Import App is only available in the SharePoint modern experience.

This document is intended to instruct users on how to use this app.

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

https://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.

a.   Enter the list that you want to import a spreadsheet into. (You can also import the spreadsheet into a specific folder within the list.)
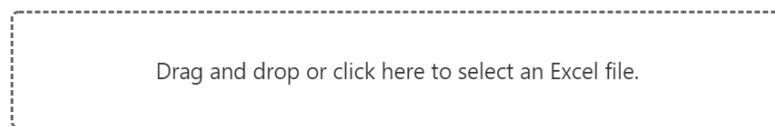
Orders ☆

Order ID ∨		Customer ∨	Product ∨	Purchased Date ∨	Unit Price ∨	Quantity ∨	Paid or not ∨	Saler ∨

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

+ New	⊞ Edit in grid view	⬑ Share	🅇 Export ∨	🅇 Import Excel	🎛 Automate ∨

c.   In the **Excel Import** dialog box, in the **Import from Spreadsheet** section, drag the Excel file you want to import into 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.

> Drag and drop or click here to select an Excel file.

All Orders.xlsx   (10.5 kB)

d.   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 **Skip header row in Excel** option 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.

Orders ▲

☑ Skip header row in Excel

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

By default, 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:	Excel Columns:
Order ID*	Order No. ▲
Customer	Customer ▲
Product	Product ▲
Purchased Date	Purchased Date ▲
Unit Price	Unit Price ▲
Quantity	Quantity ▲
Paid or not	Paid or Not ▲
Saler	Saler ▲

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 the **Import from [] to []** option, and specify the data range (e.g., from row 2 to 8), 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 [2] to [8] (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)

However, 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 the SharePoint list and Excel Sheet. To check for duplicate records, a **Key** has to be specified to identify duplicate records.

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

> *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**

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

Data that has been identified as duplicate records in an Excel spreadsheet will be skipped during the import, and only the unique records remaining will be imported.

- **Update duplicate records**

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

For the duplicate records, the Excel Import App will update the information in the duplicate records in the SharePoint Online list with the corresponding information in the Excel spreadsheet. The remaining data in the spreadsheet will be regarded as new records and imported accordingly.
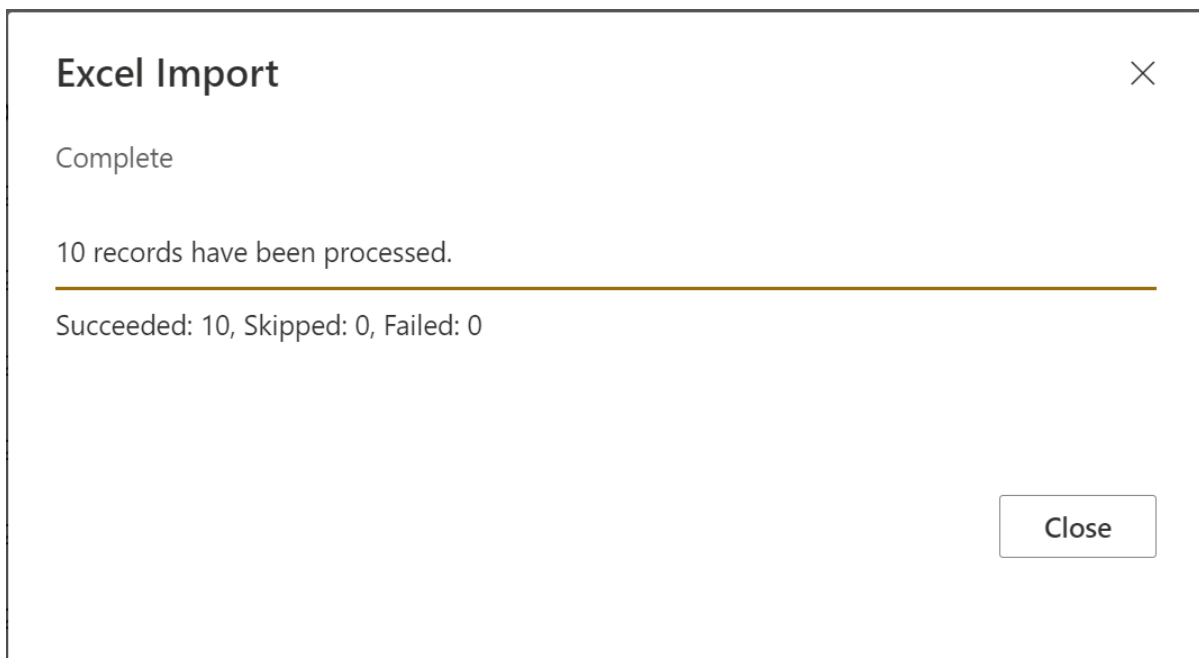
> *Note*
>
> If the key column is not unique in Excel or list, the duplicate records will be skipped.
>
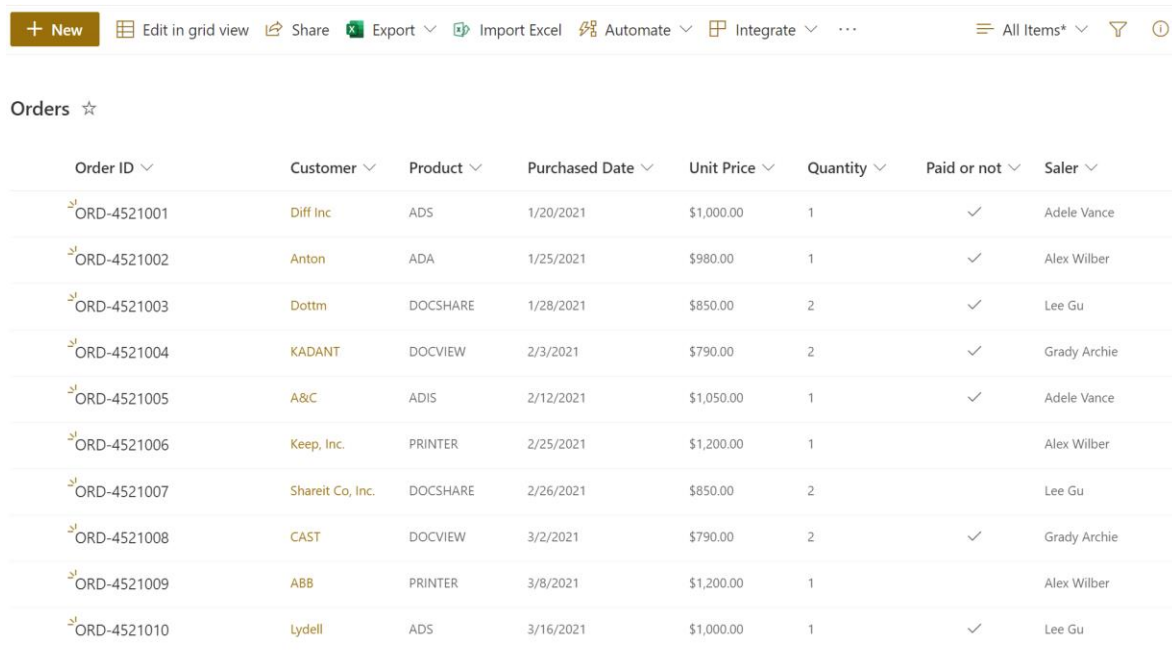> For example, supposed you have set the **Order ID** column as key:
>
> If there are multiple records in Excel with the same value of **Order ID** column, these records will be identified as duplicate and skipped.
>
> If there are multiple records with the same value of **Order ID** column in list, the records in the list will be identified as duplicate and skipped.

h. 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. In the list, you will find that all the records from the Excel file have been imported as shown below.

2.2   Supported SharePoint Column Types

The Excel Import App supports most popular 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. 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 Column:

The Choice column is a built-in SharePoint Online column with predefined values. To import values into this column type, you need to check and ensure that the values and cases are the same in both Excel and the SharePoint list.

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

For example, the values of the **Category** column must be separated by a comma, as shown below, to 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 Lookup column, the values should be separated by a semicolon ";".

For example, the values of the Related Cases column must be separated by a semicolon, as shown below, to be imported successfully to a Lookup column.

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 into 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 into this column, the values should be separated by a semicolon ";".

For example, the display name or email address 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 the 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 purchase a subscription.

The subscription for the Excel Import App is per site (previously called "site collection") or tenant, and it is billed annually.

For a site collection subscription, there are no end-user limitations. All users in the site collection can access the app.

For a tenant subscription, there are no limitations on sites or site collections. All users can access the app in all sites or site collections within the same tenant.

Checking Subscription Status

a. When you open the **Excel Import** dialog, the subscription status will be shown at the top of the web part. If the subscription is about to expire within 30 days, the notification message will display the remaining days.

b. To update the subscription status, please click on the notification message, then the License Information dialog will show.

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

License Information ✕

Your subscription will expire in 24 days

Tenant ID:	ae586225-a936-4e32-b424-6a57e257cf0c
Site ID:	{6ac53356-aa8c-4bc4-acd3-1d4163e15ac0}
Site Url:	https://bsmark.sharepoint.com/sites/TutorialWeb...
Product:	Excel Import 1.3.5.609
License Type:	Trial
Expiration Date:	7/4/2022

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

Excel Import ✕

Import an Excel spreadsheet (.xlsx, .xls, .csv) to a SharePoint list.

Your subscription is invalid.

d. Please send us (sales@boostsolutions.com) the Site URL/Site ID/Tenant ID to proceed a subscription or renewal.

e. If you purchase a site (site collection) subscription, the license status will be as following.

The license type is Site.

License Information   ✕

Your subscription will expire in 380 days

Tenant ID:	ae586225-a936-4e32-b424-6a57e257cf0c
Site ID:	{6ac53356-aa8c-4bc4-acd3-1d4163e15ac0}
Site Url:	https://bsmark.sharepoint.com/sites/TutorialWeb...
Product:	Excel Import 1.3.5.609 🛍
License Type:	Site
Expiration Date:	6/25/2023 ↻

f. If you purchase a tenant subscription, the license status will be as this.

The license type is Tenant.

License Information   ✕

Your subscription will expire in 380 days

Tenant ID:	ae586225-a936-4e32-b424-6a57e257cf0c
Site ID:	{6ac53356-aa8c-4bc4-acd3-1d4163e15ac0}
Site Url:	https://bsmark.sharepoint.com/sites/TutorialWeb...
Product:	Excel Import 1.3.5.609 🛍
License Type:	Tenant
Expiration Date:	6/25/2023 ↻