

Objectives

1. Define File Data Source
2. Define a simple List
3. Import data from File Data Source into list
4. Export data from List

1. Define File Data Source

This step is where you will configure your file source and used in later imports

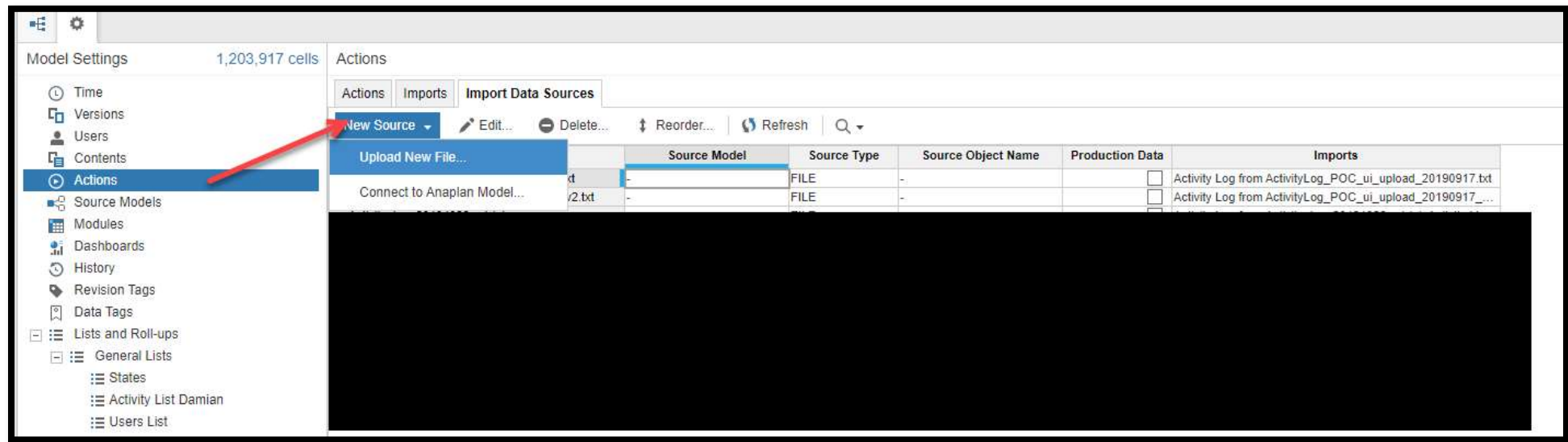
Sample States file



```
StatesInputFile - Notepad
File Edit Format View Help
States
Alabama
Alaska
Arizona
Arkansas
California
Colorado
Connecticut
Delaware
Florida
Georgia
Hawaii
Idaho
Illinois
Indiana
Iowa
Kansas
Kentucky
Louisiana
Maine
Maryland
Massachusetts
```

Download file attached and save to desktop for the next step

Create a new File source: Click on Actions --> Import Data Sources --> New Source --> Upload New File --> select the sample file provided, “StatesInputFile.txt”



Follow the setup below

File Options

Text EncodingISO-8859-1

Column Separators☒ Tab
☐ Comma
☐ Semicolon
☐ Other:

Text Delimiter"

Decimal SeparatorDot

Header Row1

First Data Row2

Default FileNot Set

Set Default FileAdmins Only

Next

Cancel

Alabama

Alaska

Arizona

Arkansas

California

Colorado

Connecticut

Delaware

Florida

Georgia

Hawaii

Idaho

Illinois

Indiana

Iowa

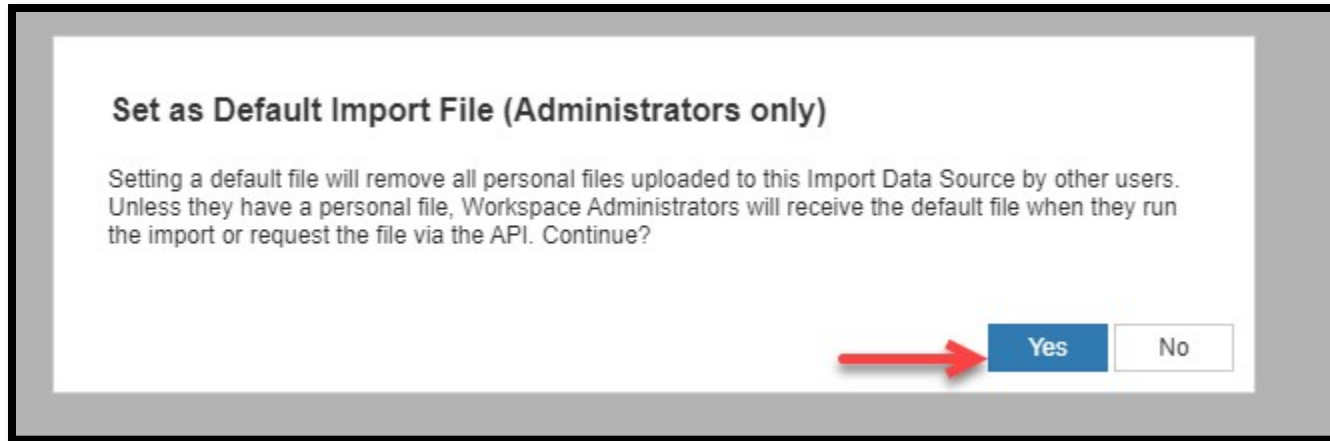
Kansas

Kentucky

Louisiana

Maine

This will allow the REST APIs to write data to this file source



File source now setup

Model Settings1,203,917 cells

Time

Versions

Users

Contents

Actions

Source Models

Modules

Dashboards

History

Revision Tags

Data Tags

Lists and Roll-ups

General Lists

States

Activity List Damian

Users List

Activity Log

City Zip Code List

Organization

Actions

Imports

Import Data Sources

New Source

Edit...

Delete...

Reorder...

Refresh

Source Model	Source Type	Source Object Name	Production Data	Imports
StatesInputFile.txt	FILE			

API upload will write to this file

2. Create a simple list to store a list of States

The screenshot displays a software interface with a sidebar on the left and a main panel on the right. The sidebar, titled 'Model Settings', shows a tree view of the model's structure. The 'States' item is selected and highlighted in blue, with a red arrow pointing to it. Below 'States' are several other items: 'Activity List Damian', 'Users List', 'Activity Log', and 'City Zip Code List'. The main panel, titled 'States', shows a table with one column named 'statename'. The 'Format' column is highlighted in blue, and a red arrow points to the 'Text' format option. The table also has a 'Format' header and a 'Refresh' button. The top of the main panel shows tabs for 'Tree View', 'Grid View', 'Properties', 'Subsets', and 'Configure'. The 'Properties' tab is active. The top of the sidebar shows '1,203,918 cells'.

Model Settings 1,203,918 cells States

Time Versions Users Contents Actions Source Models Modules Dashboards History Revision Tags Data Tags Lists and Roll-ups General Lists States Activity List Damian Users List Activity Log City Zip Code List

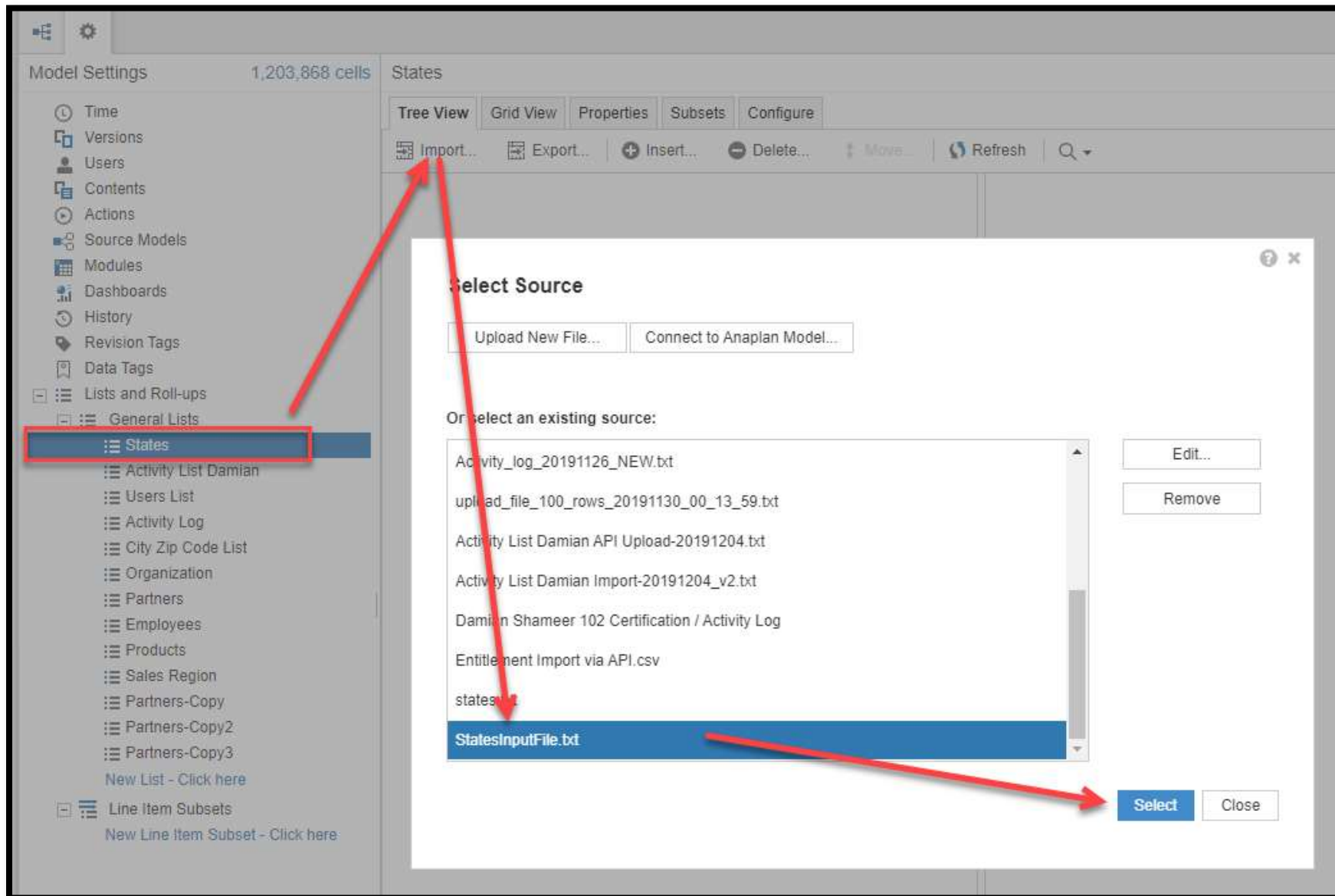
Tree View Grid View Properties Subsets Configure

View Export... Insert... Delete... Reorder... Refresh

Format

statename Text

3. Import data into the State List



Import: States from StatesInputFile.txt

Mapping

Source

Column 1: Alabama

Column 1: Alabama

Property in List

→ States

→ Parent

→ Code

→ statename

Custom Date Mapping

Items uniquely identified by

☐ Name or code

☒ Name only

☐ Code only

☐ Combination of properties

Choose properties below to build the unique identifier for the imported items

Enforce Unique Naming

☐ Adjust duplicate names to form unique names

Treatment of duplicated identifiers in source

☐ Reject entire import

☒ Import first occurrence

Treatment of duplicated identifiers in target

☐ Reject entire import

☒ Reject duplicates only

Run Import

OK

Cancel

9

Import Completed

✓

Success! Import complete.

Result Summary

Details

Expand all items

✓

States from StatesInputFile.txt

States

49 Created

0 Updated

0 Ignored

0 Failed


Model Settings 1,203,917 cells States

Time
Versions
Users
Contents
Actions
Source Models
Modules
Dashboards
History
Revision Tags
Data Tags
Lists and Roll-ups
General Lists
States
Activity List Damian
Users List
Activity Log
City Zip Code List
Organization
Partners
Employees
Products
Sales Region
Partners-Copy
Partners-Copy2
Partners-Copy3
New List - Click here
Line Item Subsets
New Line Item Subset - Click here

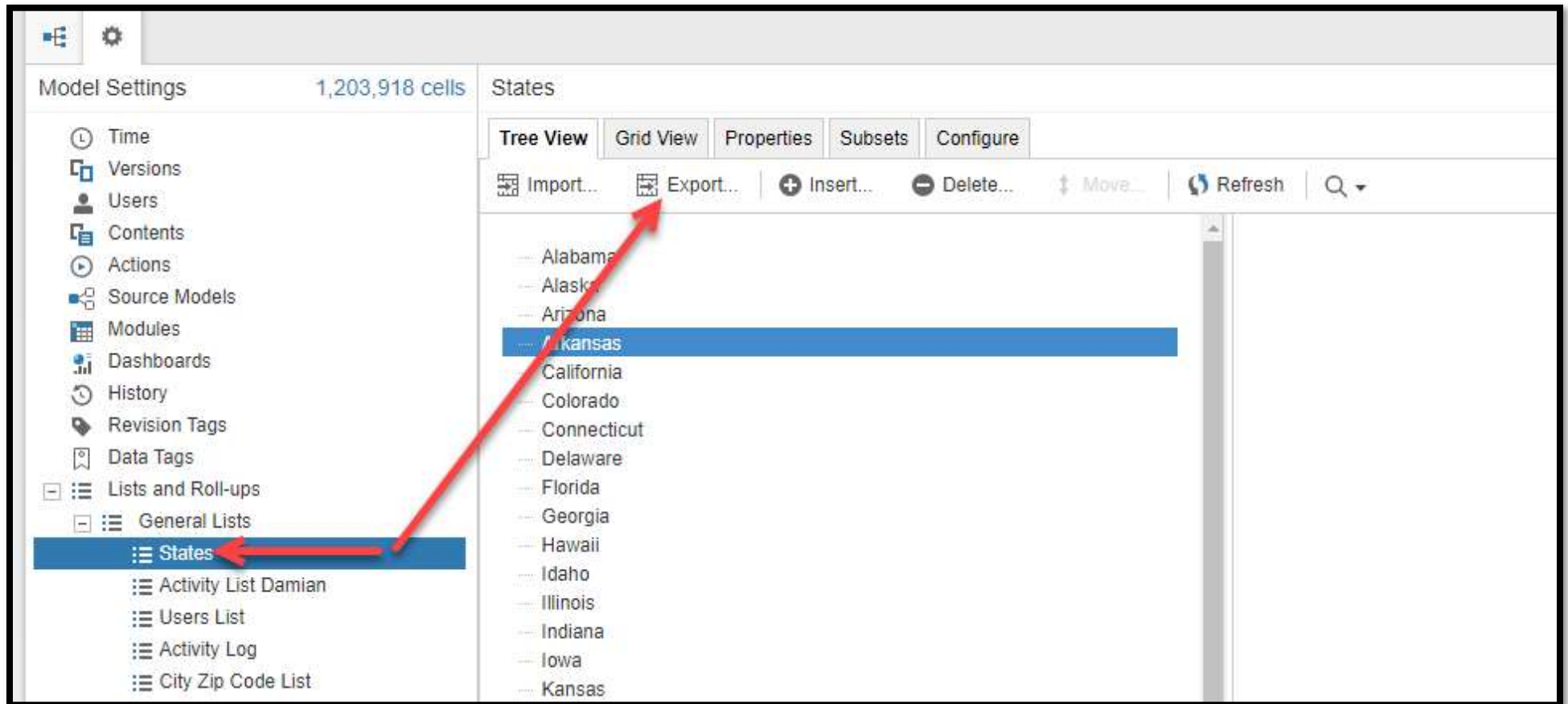
Tree View Grid View Properties Subsets Configure

Import... Export... Insert... Delete... Move... Refresh

Alaska
Arizona
Arkansas
California
Colorado
Connecticut
Delaware
Florida
Georgia
Hawaii
Idaho
Illinois
Indiana
Iowa
Kansas
Kentucky
Louisiana
Maine
Maryland
Massachusetts
Michigan
Minnesota
Mississippi
Missouri
Montana
Nebraska
Nevada
New Hampshire
New Jersey

 **Data!**

4. Create Export



?

×

Export

Layout

Labels

Export Format

File Type

Comma Separated Values (.csv) ▾

☒ Save Export Definition

Export Name:

Export Of States.csv

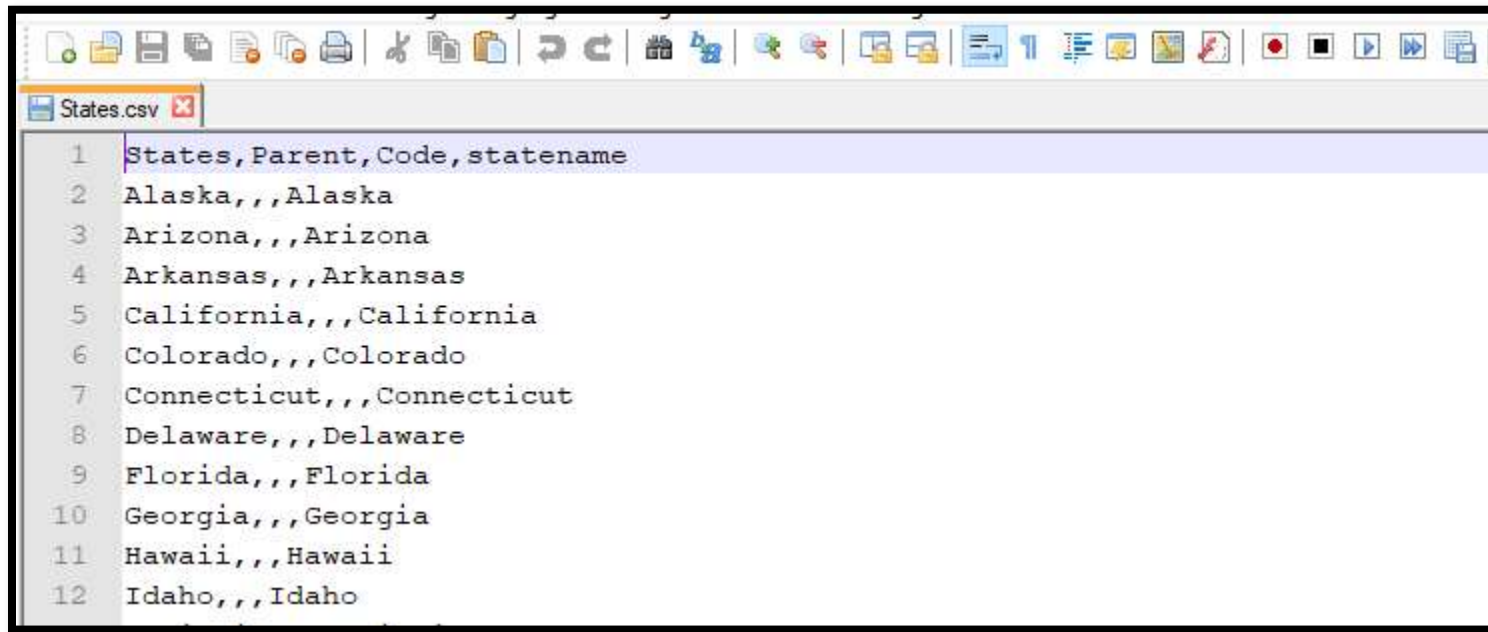
Set as default file for:

Administrators only ▾

Run Export

Cancel

Output:



```
1 States,Parent,Code,statename
2 Alaska,,,Alaska
3 Arizona,,,Arizona
4 Arkansas,,,Arkansas
5 California,,,California
6 Colorado,,,Colorado
7 Connecticut,,,Connecticut
8 Delaware,,,Delaware
9 Florida,,,Florida
10 Georgia,,,Georgia
11 Hawaii,,,Hawaii
12 Idaho,,,Idaho
```