



## Smarter Data Handling in SAP Business One

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This post describes how SAP Business One product supports data handling. It's the sequel to the post [Implementing SAP Business One Gets Easier](#)

Data handling is associated with two main operations aiming to either add new data or update existing data:

- Copying Data – Transferring data from one SAP Business One company database to another.
- Importing Data – Taking data from external source(s) in a different format and bring it into SAP Business One.

### Copying Data

SAP Business One provides you with the Quick Copy – a tool that you can launch from within the Implementation Center and use instead of the Copy Express add-on.

#### What's in it for you:

- Quick Copy takes the SAP Business One data “as is”, no preparations or pre-formatting are required.

- Quick Copy notifies you about data dependencies before copying the data, for example: I chose to copy a UDF but didn't select the UDT linked to it. The alert I receive enables me to optimize my selection and prevent errors during the copying process.

The Quick Copy supports the following scenarios:

- Copy setup and customization data as well as master data records from test system to production system. Note that copying transactional data is not supported by Quick Copy.
- Apply changes made in one company to one or more companies, for example copy user form settings or user authorizations.
- Apply updates in partner's solution, for example partner enhanced the solution by adding UDFs. With the Quick Copy, the customers can copy the newly added UDFs to their SAP Business One company database.

## Importing Data

Importing data from an external source into SAP Business One requires preparation of Excel file which contains the data in a formatted structure. Following are the common scenarios and the tool which serves best each one:

- First time implementation – Migrating all the legacy data of the customer from 3rd party system(s) into SAP Business One. For this operation which usually involves large amount of data, recommend to use the Data Transfer Workbench (DTW).
- Ongoing updates - For updating Business Partner and Item master data records, recommend using the Import from Excel tool available within SAP Business One. For updating transactional records, recommend using the DTW.

The following table highlights the main characteristics of each tool:

	DTW	Import from Excel
<b>Target Audience</b>	Consultants, Advanced users	Consultants, End users
<b>Supported Data Type</b>	Setup, master data records, and transactions	Master data only
<b>Scenario</b>	<ul style="list-style-type: none"> <li>• First time implementation</li> <li>• Ongoing updates for transactions</li> </ul>	Ongoing updates for master data
<b>Naming Convention of Fields</b>	Data Interface API	Application
<b>Excel Files Required</b>	For most objects you need separate files for main table and for sub tables	One file per object



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**Jonathan Brotto**

... 1y

Let's Start Something New

Any documentation for items such as incoming and outgoing payments as row items could be a tricky thing.

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**Ofer Oz**

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Hi Jonathan,

Thank you for your feedback. We will look closely into the topic you raised and consider possible enhancements for the documentation.

In general, knowledge transfer assets about DTW may be found under the "Support" section in the partner portal and the "Get Support" section in the customer portal... [See more](#)

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