



# Using Imported Data to Update existing Data

It often happens that you need to update your existing CatBase data with new or modified data - for example, a new price list. This is easy to accomplish with CatBase.

## Preparation

The most important item in the updating process is the unique key field. You must have something in your update file which matches with something in the existing data. Usually this will be a reference number, ID number, part number, etc. It is not recommended to use a name (such as a Company Name) unless you are absolutely sure that there will be no duplicates.

If you really don't have a unique field, CatBase offers the option of selecting a secondary key field. For example, your main key field could be Company Name and the secondary key field could be Telephone Number. But it's always best to use a unique identifier if possible!

Prepare your update file with at least the following fields:

- Unique key, or primary and secondary keys
- The data you want to update

The fields do not need to be in any particular order (the unique key field does not have to be first).

The file can contain additional fields - you can just ignore them.

## Setting up the Import Style

- Select the data table that you want to update.
- Expand the **Import** topic on the left of the window.
- Click **New Import Style**.
- Enter a name for the Import Style, such as "Pric update".
- Select the **Import Source** format (spreadsheet, XML, csv file, etc.).
- Click the **Select** button and open your import file.
- Map the columns in the import file to your CatBase fields. Make sure that the unique key field is correctly mapped! If there are any columns in the import file that you do not want to use, just select *Extra Field*.
- When all the columns have been mapped, go to the **Update** tab.
- The Update options look like this:

Field	Update?
Description	<input type="checkbox"/>
MainCategoryName	<input type="checkbox"/>
option	<input type="checkbox"/>
Picture	<input type="checkbox"/>
Price	<input type="checkbox"/>
Product name	<input type="checkbox"/>
Special Offer	<input type="checkbox"/>
special offer text	<input type="checkbox"/>

- Select the **Update existing records** radio button.
- Select the **Don't create new records** checkbox if you want to make sure that no NEW records are imported.
- Select your **Primary Key Field** from the popup.
- If necessary, select your **Secondary Key Field** as well.
- If you want to update all the fields listed, leave the **Update All fields** option selected.
- If you want to update only certain fields, select the **Update Selected Fields Only** radio button, and then select the **Update** checkbox for the fields you want to update.

**NOTE: YOU CANNOT UPDATE THE PRIMARY OR SECONDARY KEY FIELDS!** Even if they are selected, CatB are will not update them.

## Example: Updating the prices

In this example we are going to update just the *Price*, using the *Part Number* as the Primary Key:

Name: Update prices Impo

Table: Parts

Delete all records in the table before importing data

Don't update records (only insert new ones)

Data Updating Options

Update existing records  Don't create new records

Primary Key Field: Impo

Secondary Key Field: None

Update Selected Fields Only  Update All fields

Import Fields:

Now go back to the Main tab and click the **Import Now** button to update the data.

**NOTE:** It is usually a good idea to make a backup of your database before updating your data in this way, especially if you are a bit nervous about updating your data.

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Price