Who's here?

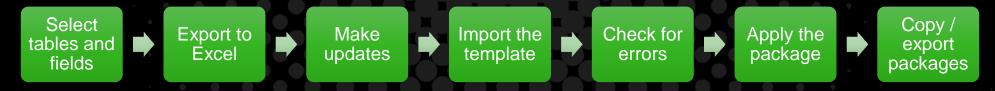- **Who is technical? Functional?**

- **Who has used Configuration Packages? Has not?**

- **What do you like about them? Challenges?**

Configuration Packages?

A *standard* Business Central tool that allows you to import and export data into tables using Excel templates.*

Select tables and fields → Export to Excel → Make updates → Import the template → Check for errors → Apply the package → Copy / export packages

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*DUG

*Two Blind Mice - Episode 5: Let's Talk About Business Central Configuration Packages!
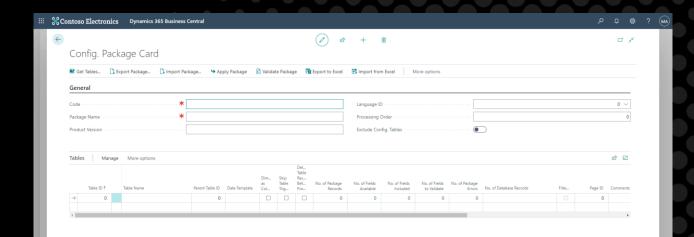
Configuration Packages?

- **RapidStart?**

- **Licensing?**

- **Who should use?**

- **Key terms**
  - Validate / Apply Package
  - Export / Import Package vs. Edit in Excel

Let's try one...

Let's export some Contacts

Common Uses (Import/Export)

Supplemental Data (Lookups)	Master Data	Subsidiary Data (Drill-Downs)	Open Transaction Data	Posted Transaction Data
• Payment Methods • Payment Terms • Shipment Methods	• Customers • Vendors • Items • Fixed Assets • Contacts • Jobs	• Item Prices/Costs • Vendor Items • Customer Alternate Addresses	• Sales/Purchase Documents • Journal Lines	• General Ledger • ~~Ledger~~ • ~~~~ • Etc. **NOT DIRECTLY**

Your Amazing Uses?

1. Break into groups of 3
2. Brainstorm on uses
3. Select your best one
4. Share

TIPS & TRICKS
EXPORTING PACKAGES

Exporting Configuration Packages

- **"Exclude Config. Tables"**
  - Enable to prevent the inclusion of questionnaire, worksheet, and template table data
  - Otherwise, the additional tables may be confusing

- **"Dimensions as Columns"**
  - Enable to include all Dimensions Codes as additional columns

- **Config. Package Filters**
  - To limit or eliminate records during export

Export to Excel

- **Do NOT mess with the worksheets (or with Texas)**
  - Tip from Erik Hougaard
  - The package links to the BC table via a hidden excel field
  - To maintain the integrity of worksheet:
    - Do not:
      - Modify ANY table headers
      - Modify ANY column structure or order
      - Modify ANY worksheet structure or name
      - Etc.!!
    - Only update the data inside the table.
  - Otherwise you'll confuse the system.

TIPS & TRICKS
IMPORTING PACKAGES

Importing Configuration Packages

- **Try imports in a test company first!**

- **Config. Package Fields**
  - Validate Field
  - Processing Order
    - Same order you would manually populate the page
  - Create Missing Codes
  - Mapping

Clean Data - Best Practices

- **Eliminate non-printing characters**
  - Especially control characters (TAB, CR, LF, etc.)
  - Use CLEAN() in Excel

- **Avoid ambiguous symbol characters**
  - Like: !@#$%&*()|
  - Especially in Code fields

Clean Data (Use Excel!)

- [**Top ten ways to clean your data (microsoft.com)**](microsoft.com)

- **Merge data from other sources**
  - VLOOKUP()

- **Remove non-printing characters**
  - CLEAN()

- **Text, not Formulas!**

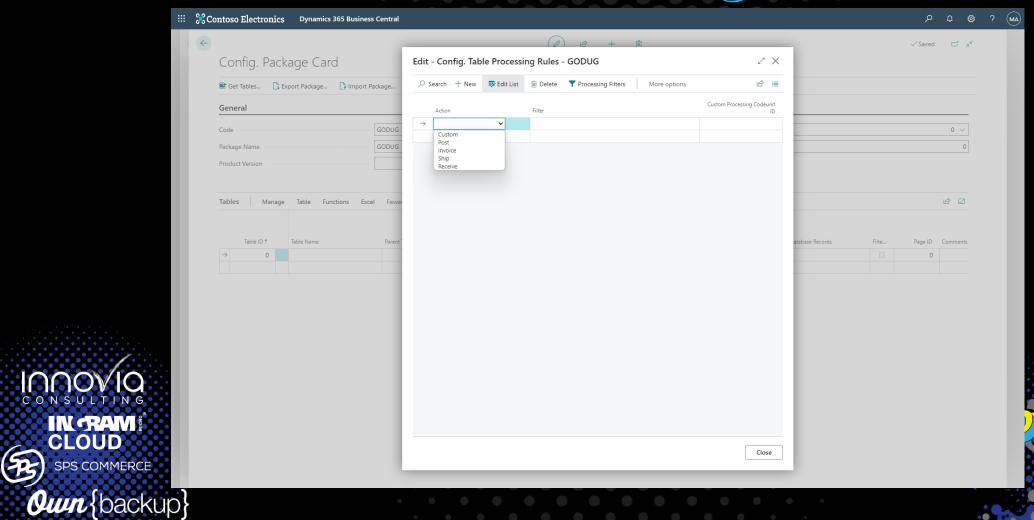# Table Processing Rules

Table Processing Rules

- **Sales Header**
  - Invoice, Ship
- **Purchase Header**
  - Invoice, Receive
- **General Journal Line, General Journal Batch**
  - Post
- **Custom Report Layout**
  - Post – inserts into "Report Layout Selection"
- **Transfer Header**
  - Ship, Receive
- **Item**
  - Post – runs codeunit "Setup Item Costing Method"

Gotchas

- **Apply headers before lines**
  - Manually control the order via Functions > Apply Data
    - i.e. after importing, select the header table and apply it first, then apply whole package

- **To remove a bad import:**
  - Export again, delete all data but the first line, then re-import with "Delete Table Records Before Processing" checkbox enabled – this will delete all table records but the one
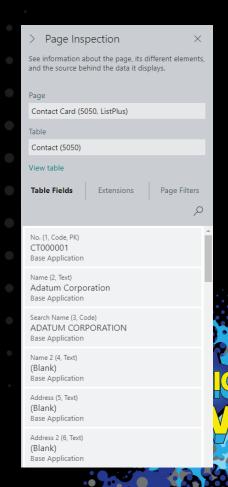
MORE TIPS & TRICKS

Tips

- **Only use the necessary fields**
  - BC will autofill / calculate some fields and you can accidentally overwrite these with incorrect data.

- **Not sure which fields you want? ALT + CTRL + F1**
  - Open Page Inspection on a record and review what's there

Edit .rapidstart File

- **Export to .rapidstart**
- **Unzip with .7zip**
- **XML!**
- **Edit XML**
- **Zip with gzip format**

Resources for you

- **A great demo by some awesome folks:**
  - https://www.youtube.com/watch?v=XgxTvXZKcY0

- **An extensive how-to:**
  - https://businesscentralgeek.com/definitive-guide-to-configuration-packages-in-business-central

- **Excel CLEAN function:**
  - https://support.microsoft.com/en-us/office/clean-function-26f3d7c5-475f-4a9c-90e5-4b8ba987ba41

Thank you!

Contact Floyd

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Ask Floyd!

Contact Mark

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continia.com

Don't forget to pick up a Continia brochure

Complete your survey!

These kittens are depending on you!