BluWave- Importing Data

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1. Introduction

In order to import data into BluWave it is important that the data is in the correct format and excludes forbidden characters.

The format used is a CSV file, with specific formatting.

Attempting to import files with the incorrect formatting will fail.

BluWave provides a CSV template for each type of import that can be downloaded from the imports section of the system setup. Users may download this template and use it to format their data prior to import. The template contains the column headings to be used in the correct order, plus a few examples of test data.

1.1 Downloading the Import format

Click on the **System Setup** menu and then the **Imports** option, then select the information that you want to import from the options displayed and click on the **Next** button.
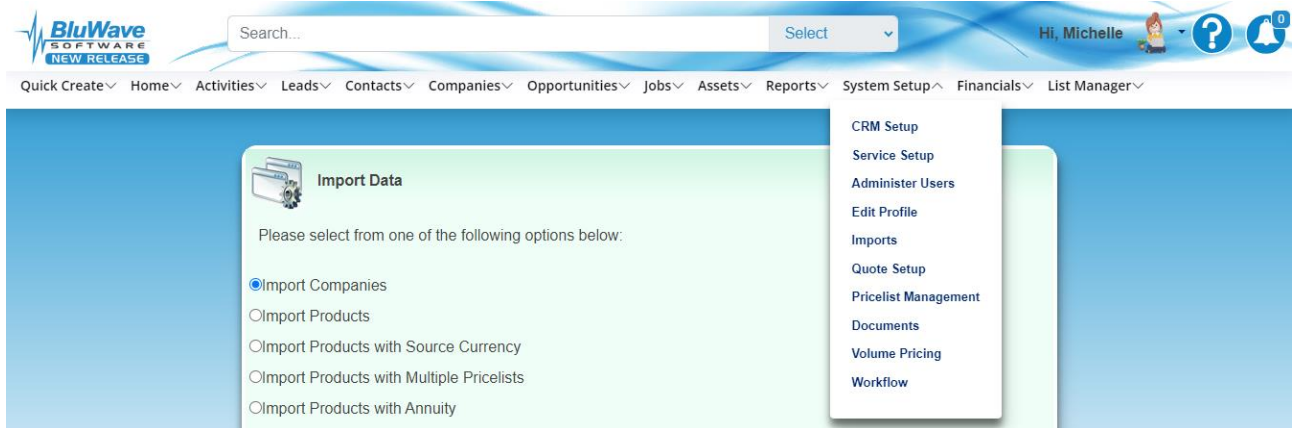
Click on the **Download import format** link to download the template that displays the required data format for a successful import to take place.

The file should be in your downloads folder.

1.2   Filling in the Data

The import format for each type of import is unique.

The template displays the headings used in the correct column order (which includes the data format and indicates required where necessary) as well as instructions needed to complete the information and examples of test data. The test data and instructions should be removed but the column headings must not be changed.

The user simply needs to populate the spreadsheet with their data in the correct fields.

It is important to note that the import will fail if the headings are changed in any manner.

General Instructions:
- Please save this file as a CSV (Comma delimited) (*.csv) and then import the CSV file into BluWave.
- DO NOT delete or rearrange any columns found in line 1.
- Please remove all blank rows between your data.
- Find and replace all non-permitted characters using CTRL +F.
- NB: There must be no commas (,) , inches (") , apostrophes ('), Semi colons (;) Acute (`) and enter characters (Found by pressing CTRL + J).
- Only the first record requires an account number if, any of the customer records do not have an account number e.g. A0.

Make sure that the following fields are populated, depending on what data needs to be imported. For all the fields that indicate a code is necessary- please find these codes in your system setup menu/options.

1.3 Removing unnecessary Punctuation

The import document must be free of specific characters for a successful import.

The forbidden characters are:

- Comma (,)
- Inch (")
- Semi-colon (;)
- Apostrophe (')
- Enter keys (ctrl + J)
- Accent (`)
- Commas or thousand separators in number values. All numeric columns should be filled in with at least a zero (o) and should not contain any thousand separates such as spaces or commas.

Once all of the data is populated in the correct columns and all the necessary fields are filled in you must remove any forbidden characters prior to import

Make sure to replace all of the commas (,), inches ("), semi-colons (;), apostrophes (') & enter keys (ctrl + j).

(Click on the "Find & Select" button and in the "Replace"-tab, type the character mentioned above in the "Find what:"-field and type a space/ or backspace in the "Replace with:"-field. First click on the "Find All"-button and then on the "Replace All"-button. Do this for all the characters.)
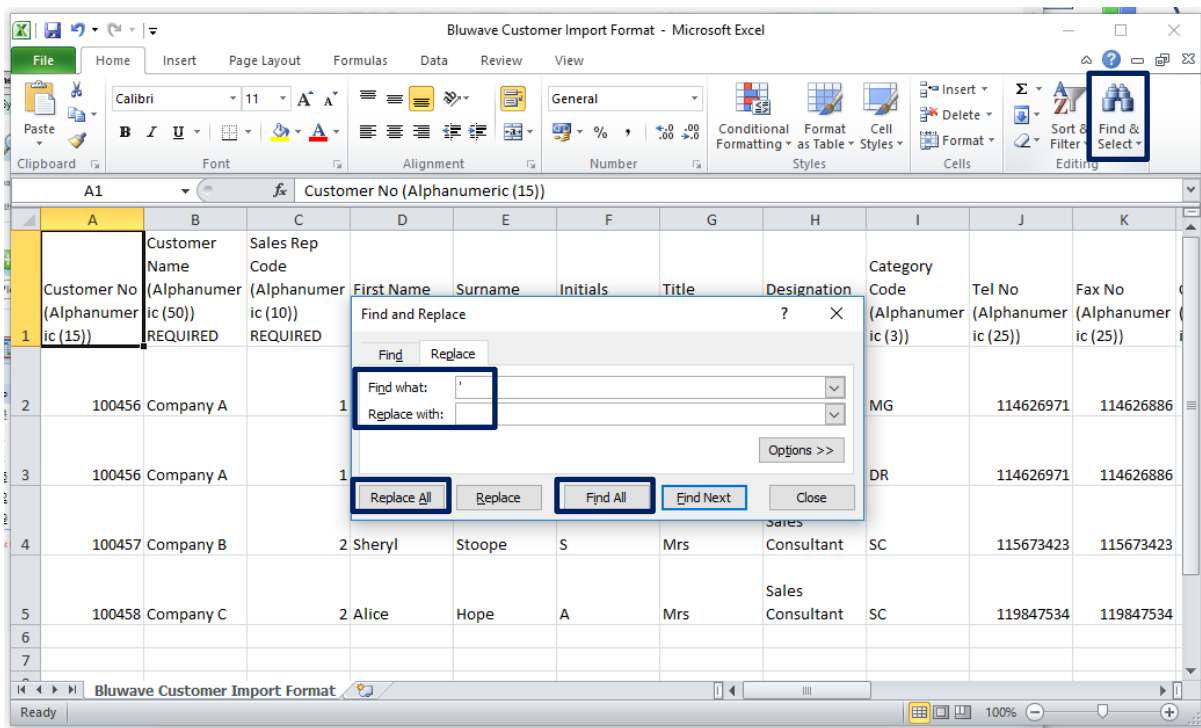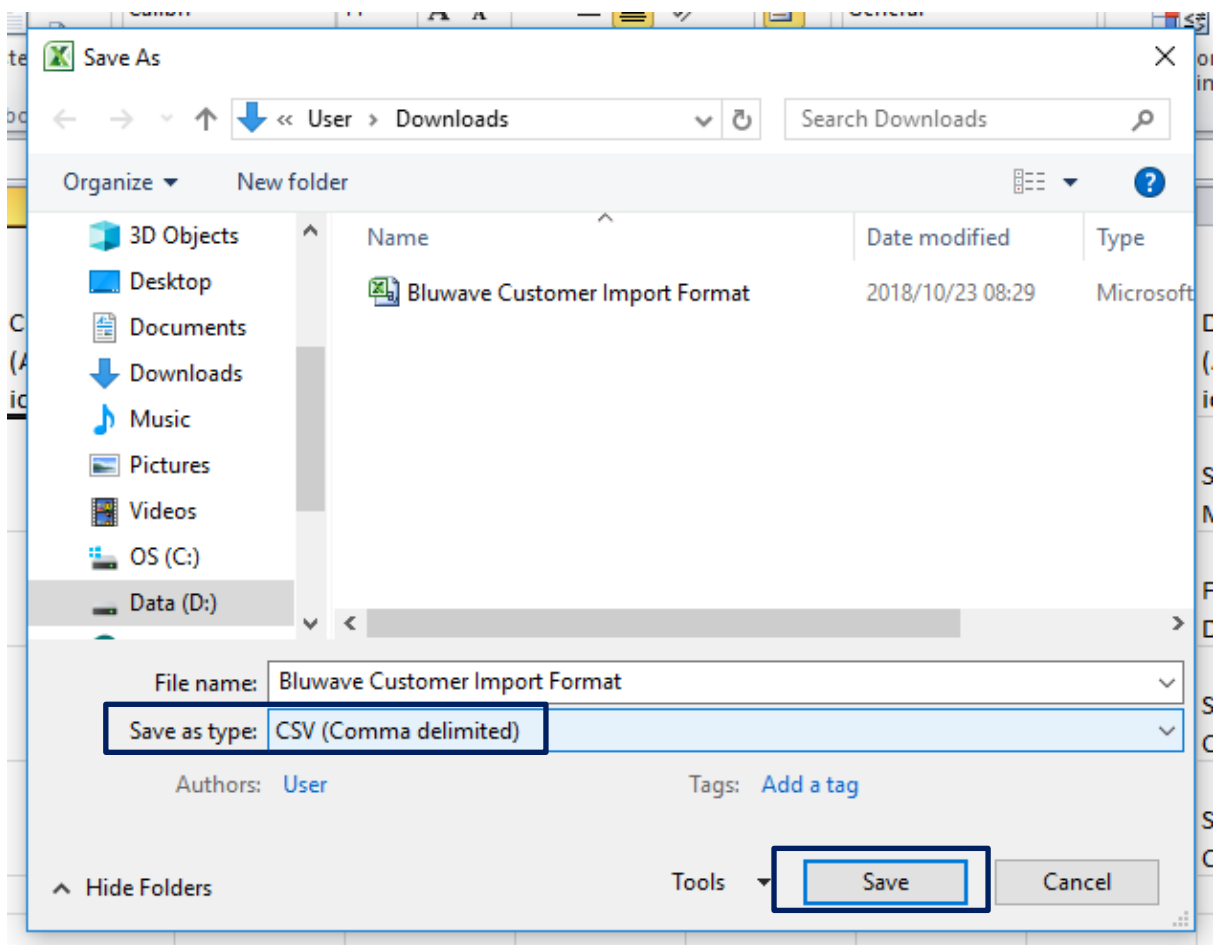

1.4 Saving the Excel Spreadsheet as a CSV file

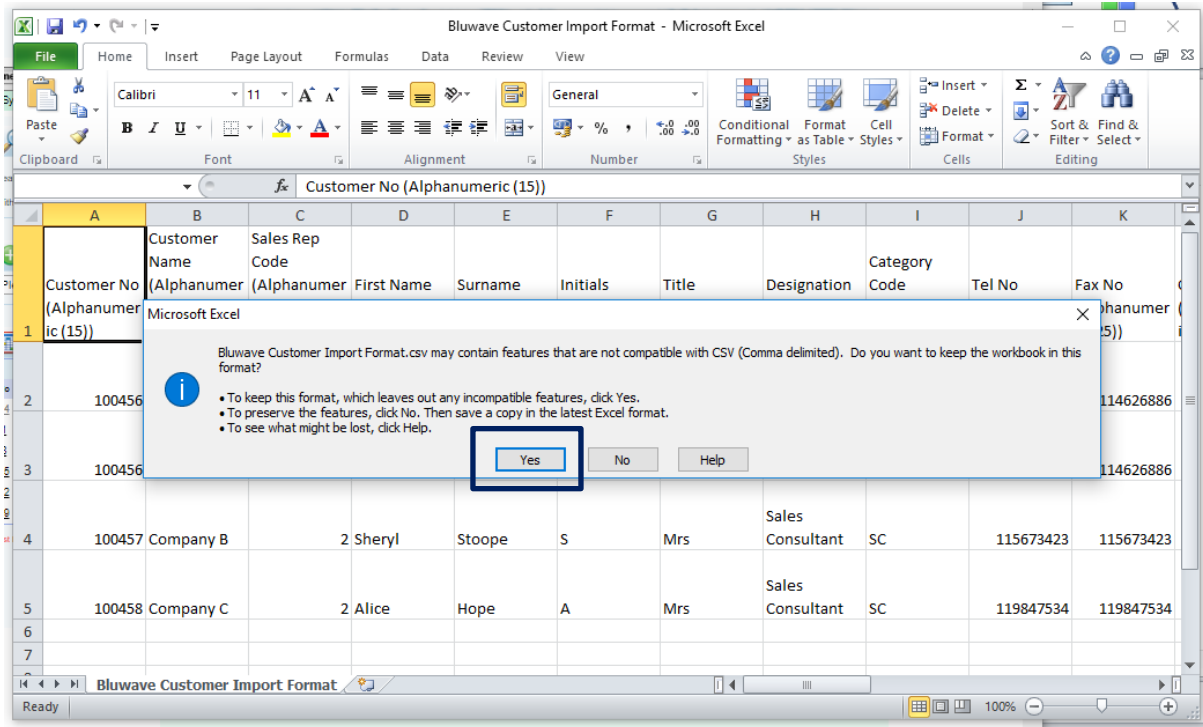After replacing all of the characters, save the file in a ".csv" format.

(Click on "File" and then on "Save as")
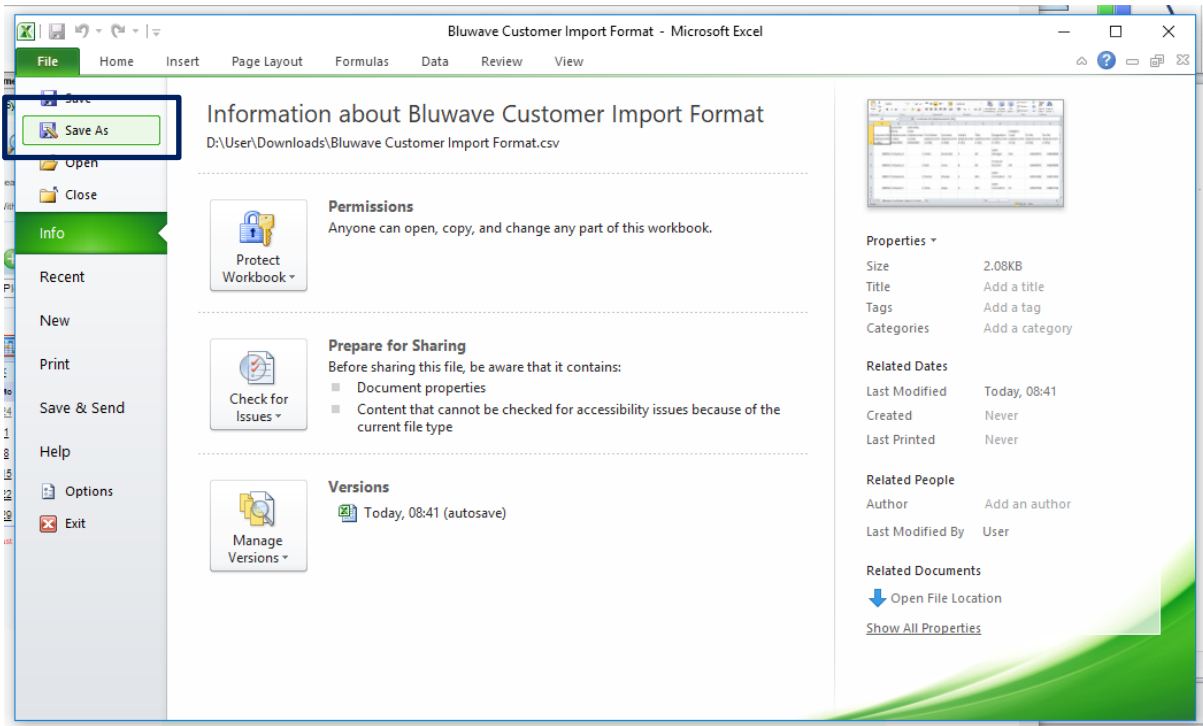
Search on the computer where you would like to save the file. Make sure that in the "Save as type:" you selected "CSV (Comma delimited)" and click on "Save".

When this message box appears, make sure to click on "Yes". The Excel spreadsheet can then be closed.
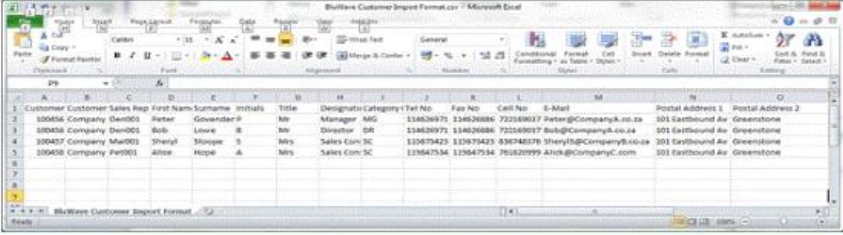
1.5   Uploading the CSV file to BluWave

1.   In BluWave, click on "Choose File" to select the spreadsheet you have just created and saved.

Search for the file on your computer, select it and click on the **Open** button.
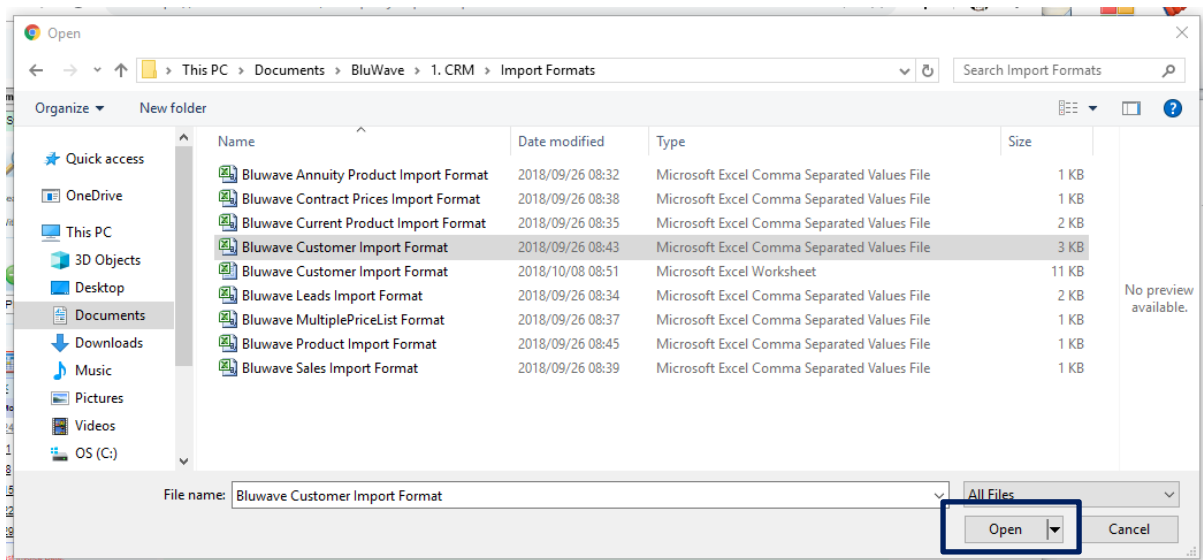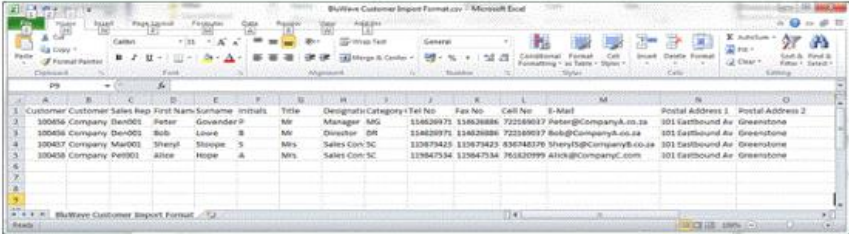
Make sure that the correct file appears next to the **Choose File** button.

Once you have selected the correct file, click on the **Upload file & import** button, click on the **Ok** button on the pop-up that says the upload was done successfully. Double check your imports by searching in the system for the entries that you've imported.

2. Changing your Region Settings

If your system is saving the comma delimited (csv) files using a semi colon as the separator, you will need to change your region settings on your computer. This will allow you to import the file into *BluWave* successfully.
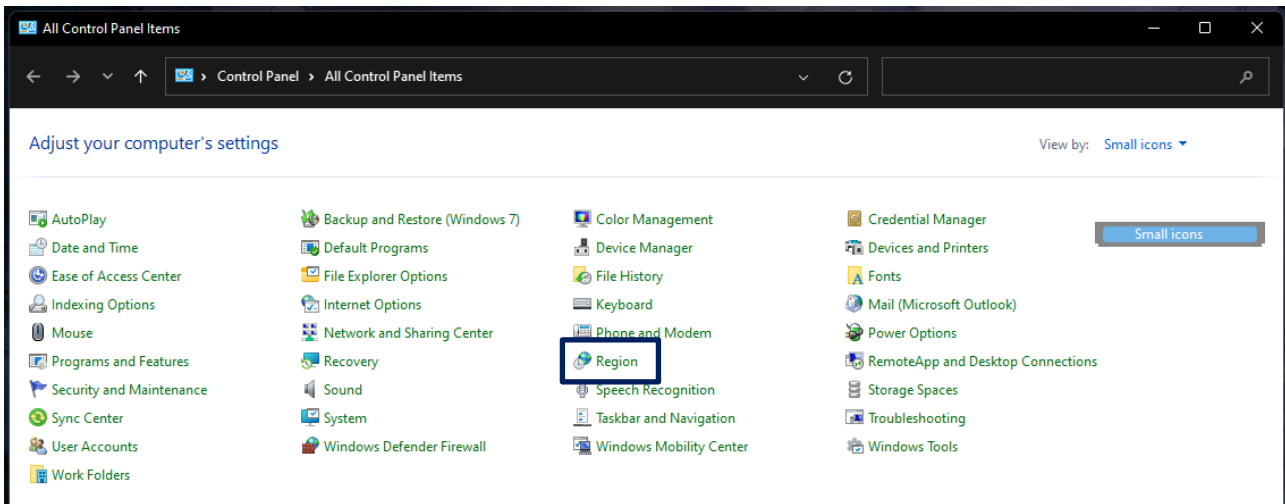
2.1 Accessing the control panel > Region

To Access the control panel on your computer, click on the start button and then search for **Control Panel**.
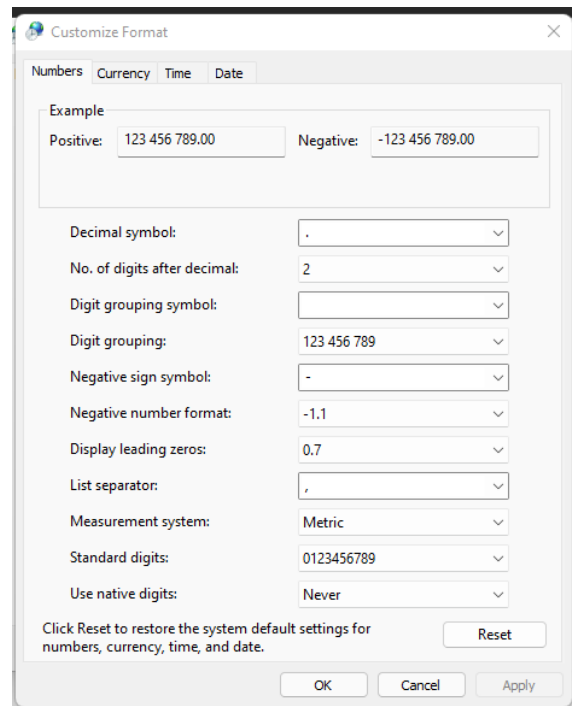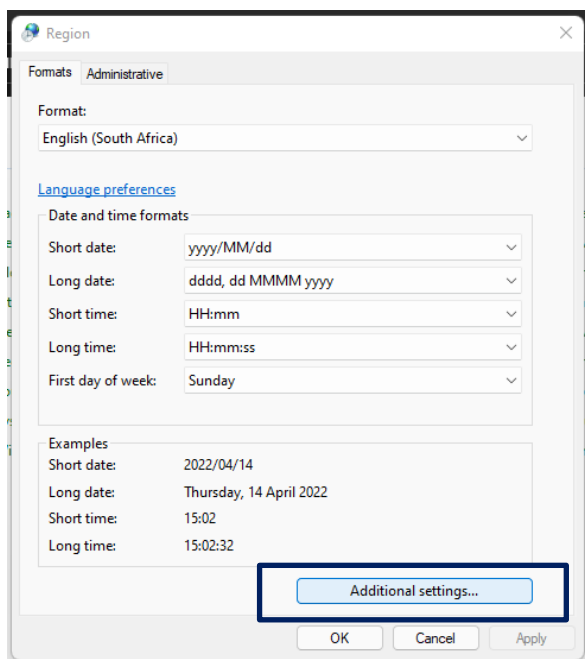
Once you have clicked on the **Open** option you will have access to the region settings.

Or click on the **Region** option from the start panel to open the settings page.
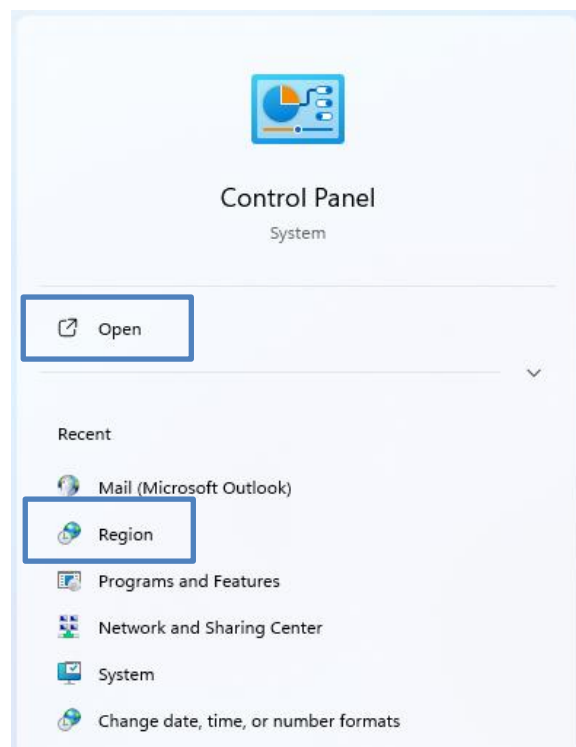
Click on the **Additional Settings** button.

Ensure that the Decimal symbol is set to a full stop (.) and that the List Separator is set to a comma (,). Once you have made these changes, click on the **Apply** button and then the **Ok** button. Repeat this on the next page to save your settings.

3. Revision History

Version	Date	Updates
SM0013.2	30/06/2022	• Updated the explanations • Added the Region settings • Removed the Text to Column function explanation, as it is not applicable anymore. • Updated file name layout.
SM0013.3	06/05/2024	• Updated the screenshots for the new release