

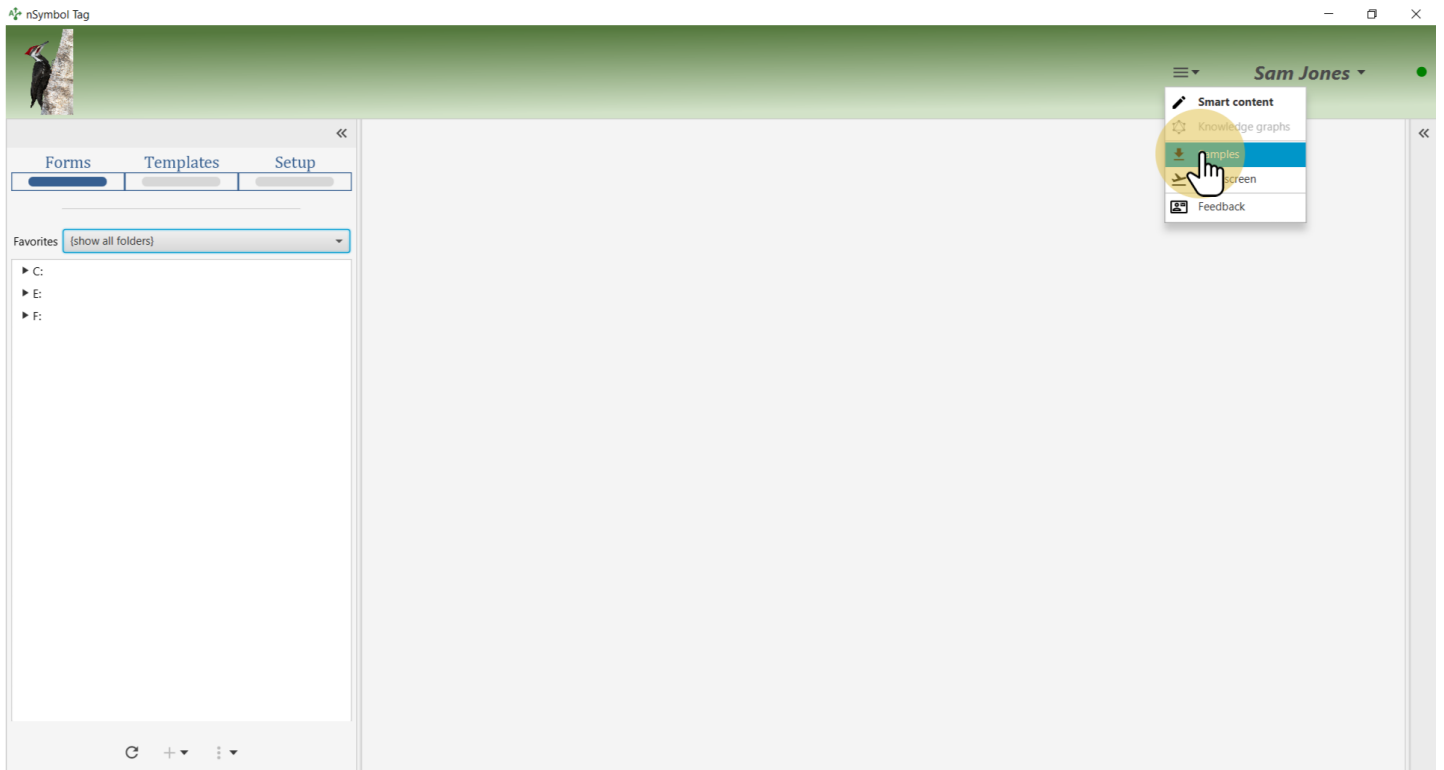
CSV Import

This guide shows how to import data from a CSV file into a form.



1 Go to Samples app

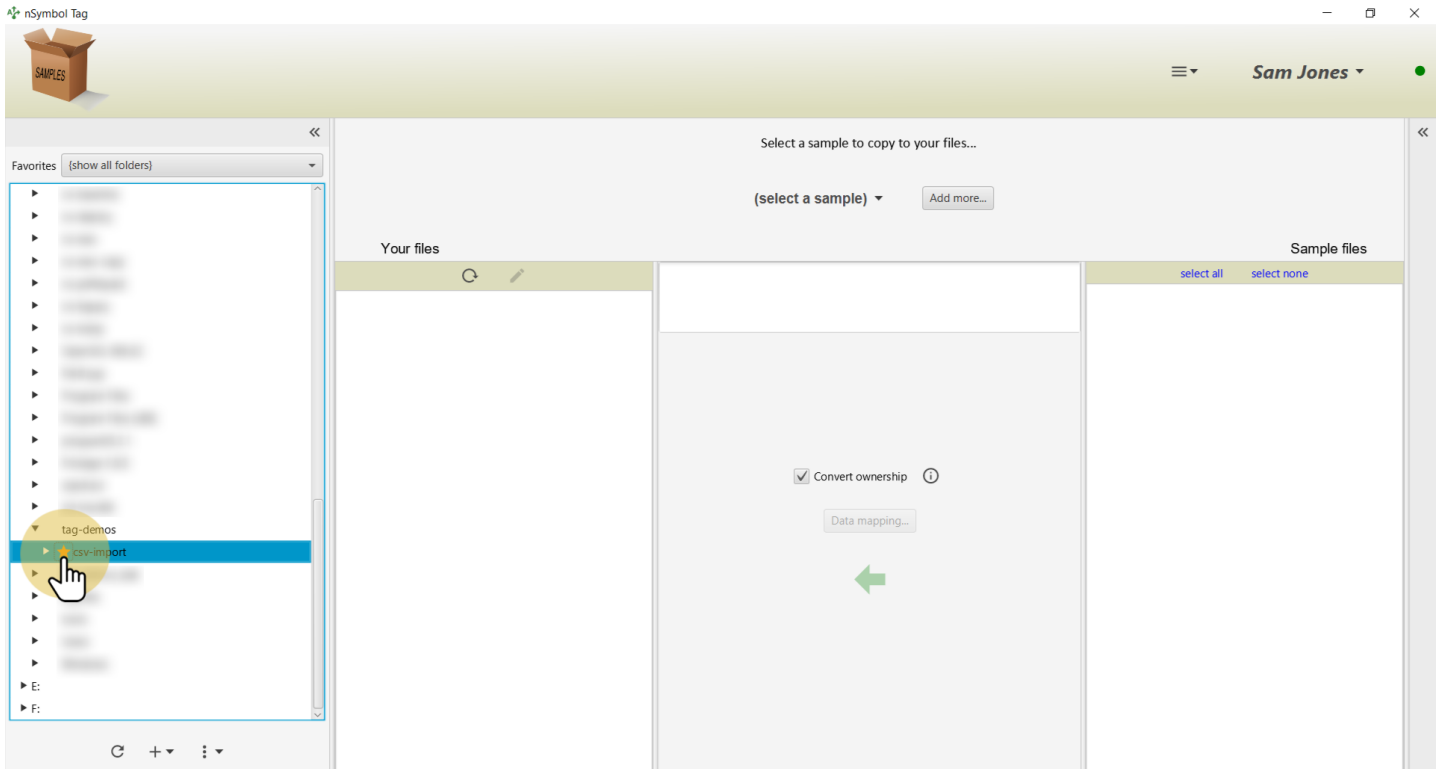
Go to the *Samples* app using the *Apps* menu.





2 Select a favorite folder

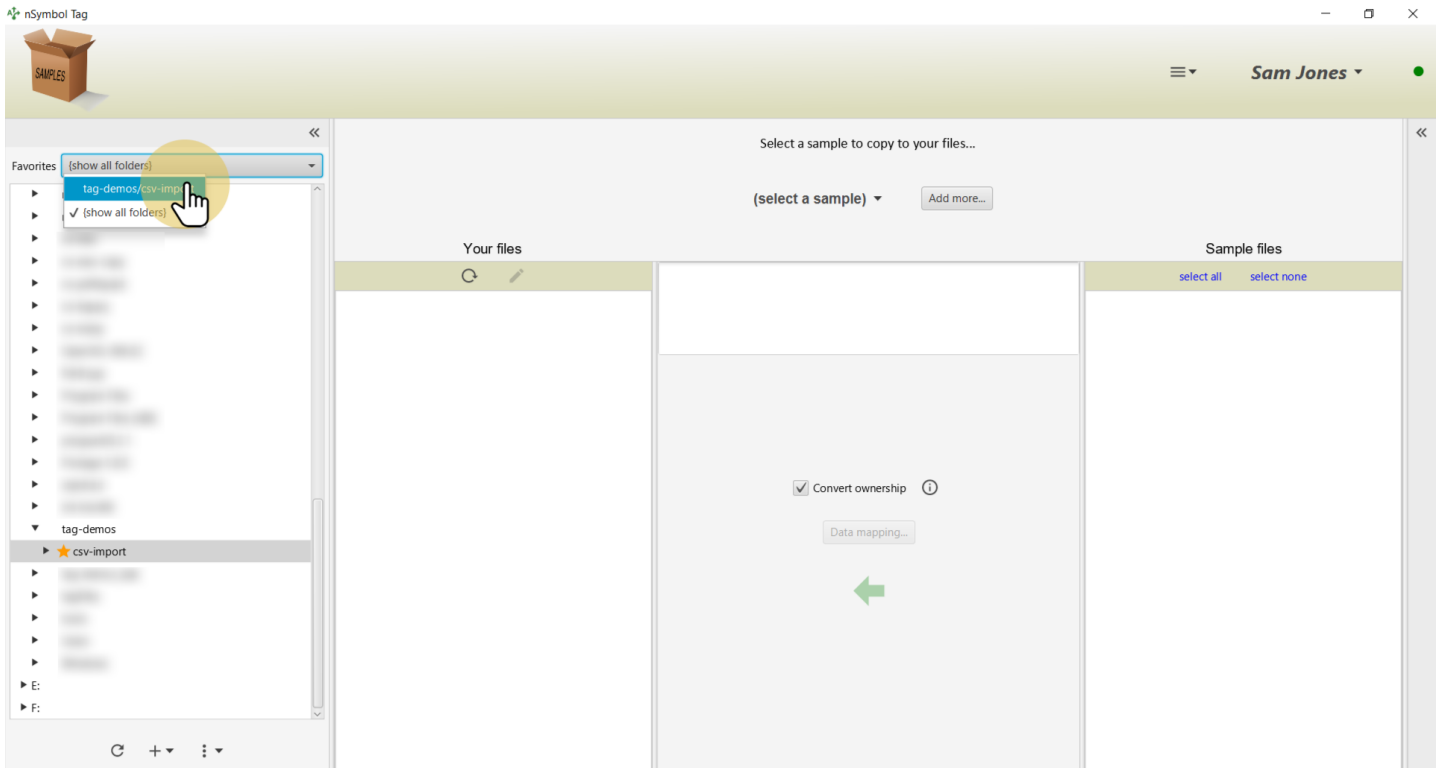
Find or create a folder to hold sample files. Click on the *star* icon next to the file name to make this a favorite folder.





3 Select favorite folder

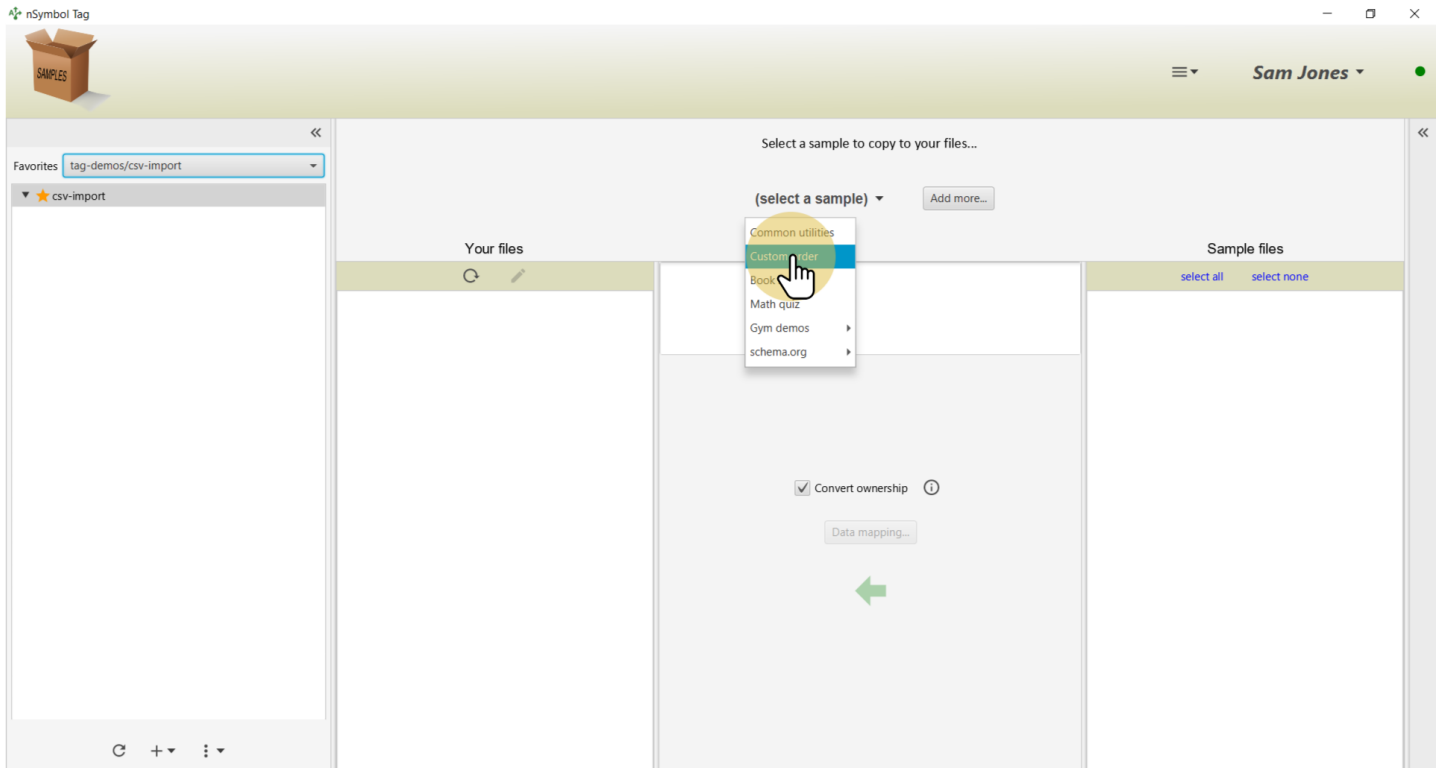
Select the folder in the *Favorites* dropdown list to reduce screen clutter.





4 Select the Custom order sample

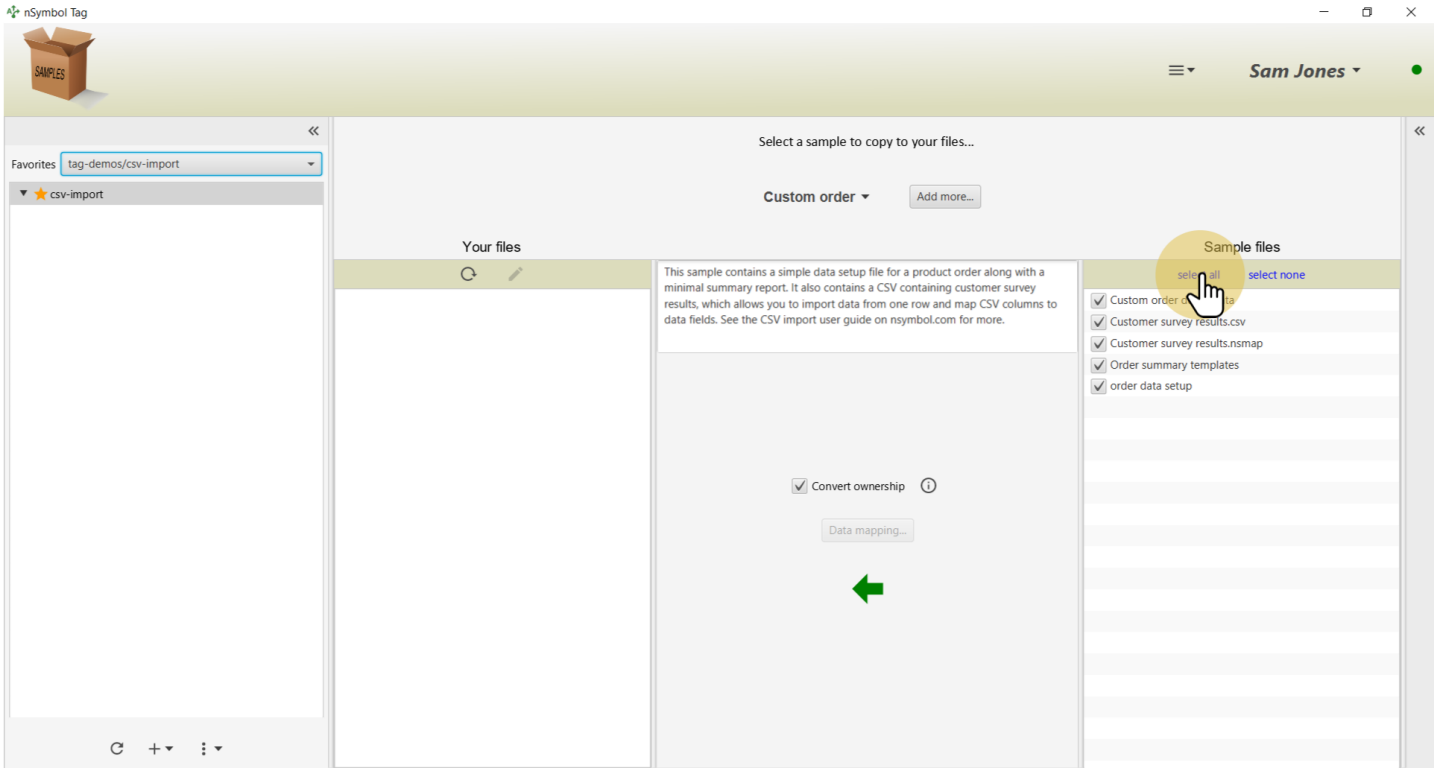
Select the Custom order sample using the *samples* menu.





5 Select all files

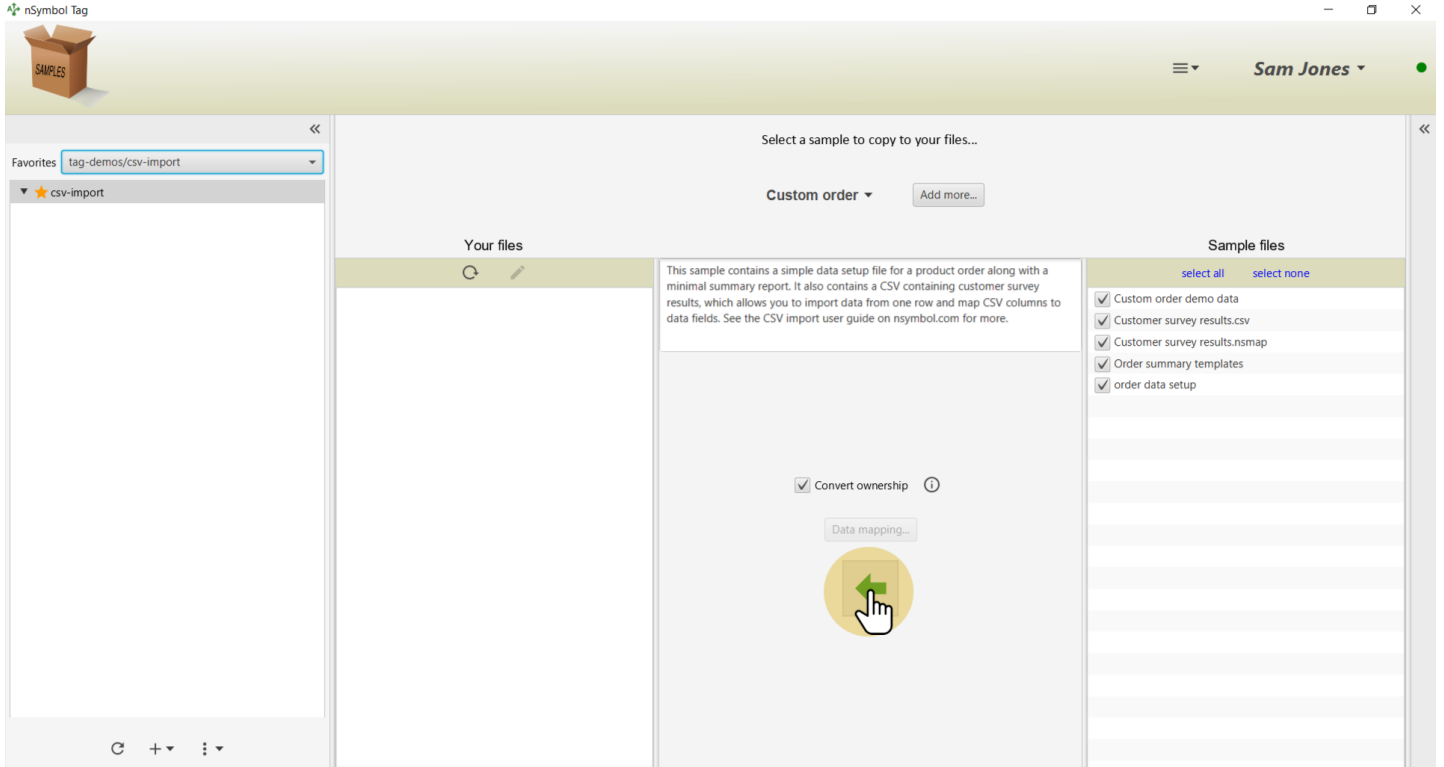
Use the *select all* tool to select all files to copy.





6 Copy files

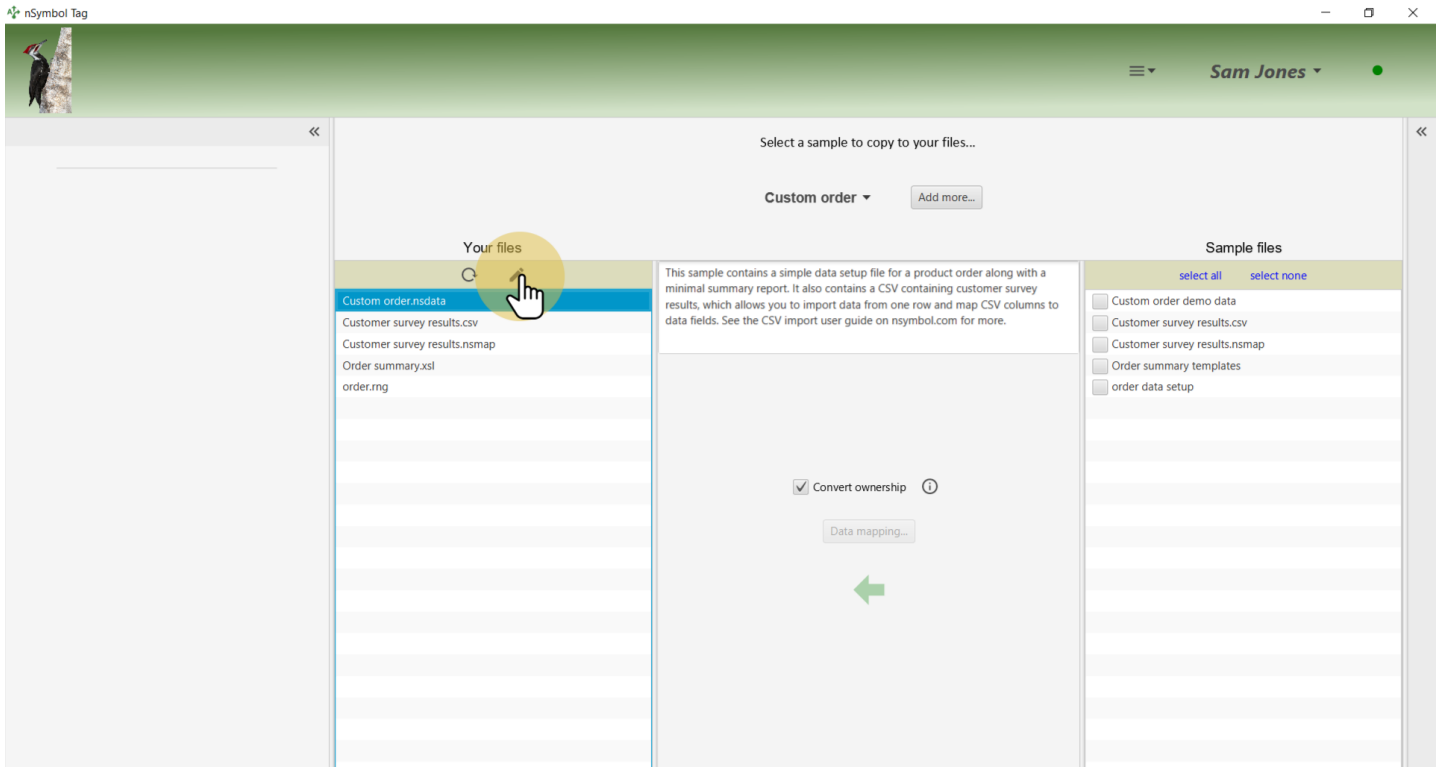
Click the *big arrow* tool to copy all files to your local folder. The namespace used in the data setup file will be customized to your account if the *Convert ownership* checkbox is selected (recommended).





7 View the data file

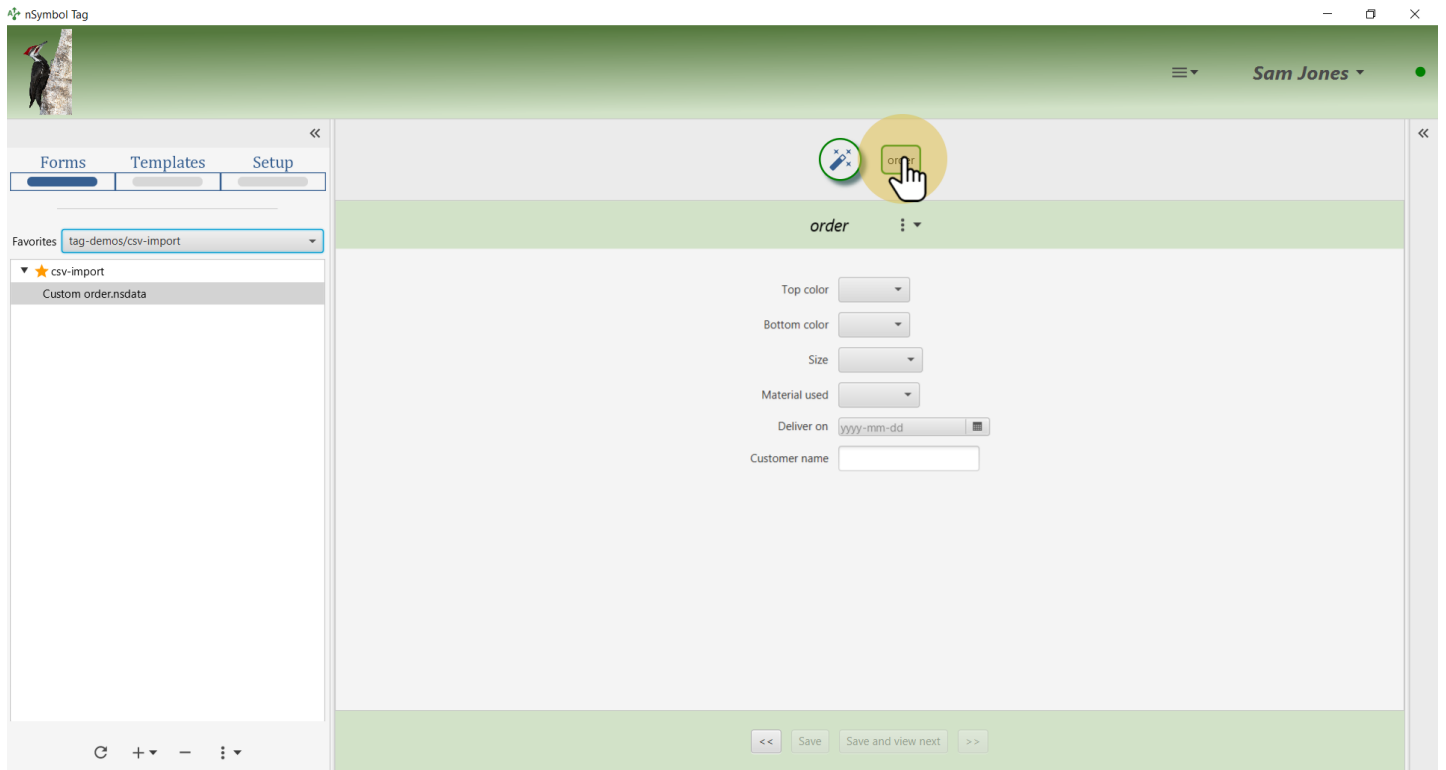
Select the "Custom order.nsdata" file and click the *pencil* tool. This will take you to the *Forms* screen in the *Smart content app*.





8 View the order form

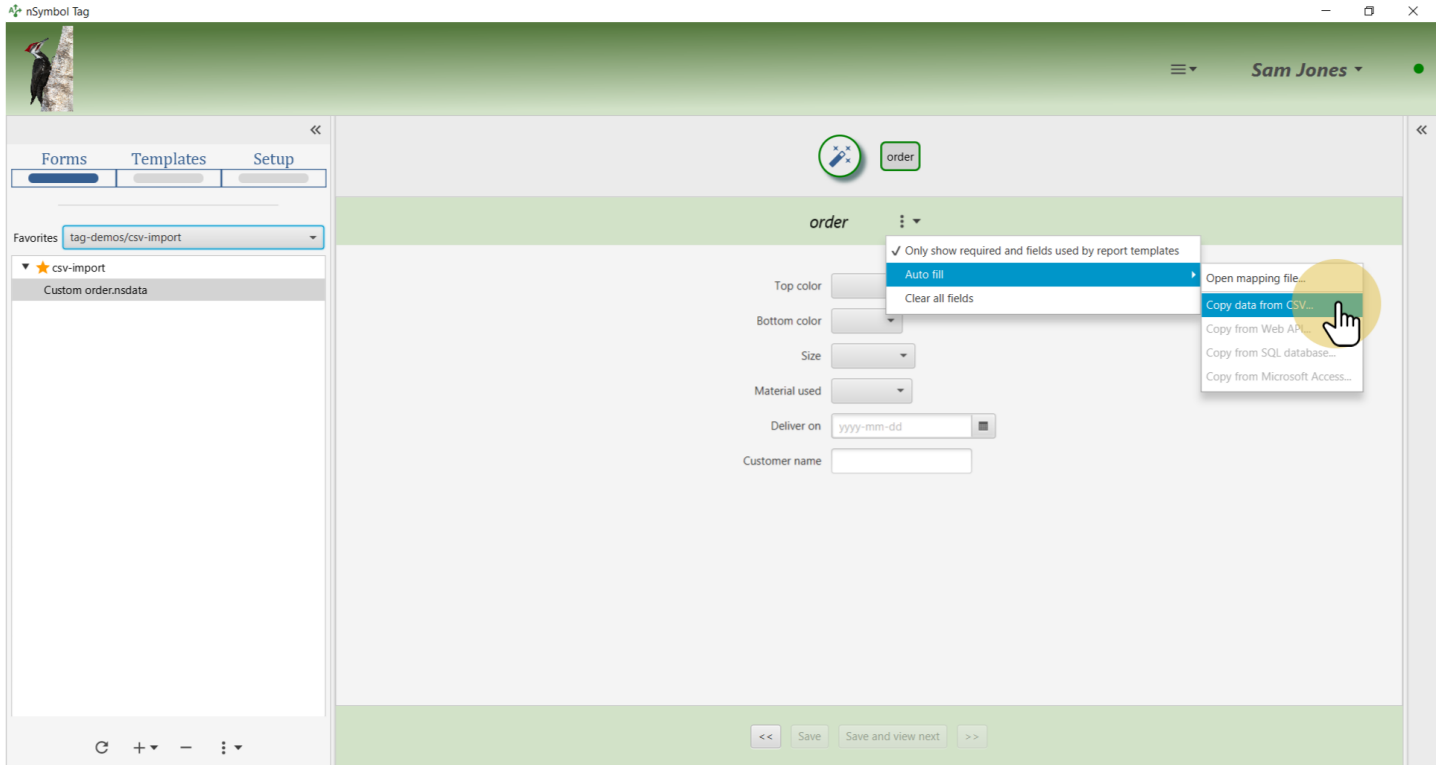
Click on the *order* tab to display data entry controls for this order.





9 Open CSV import wizard

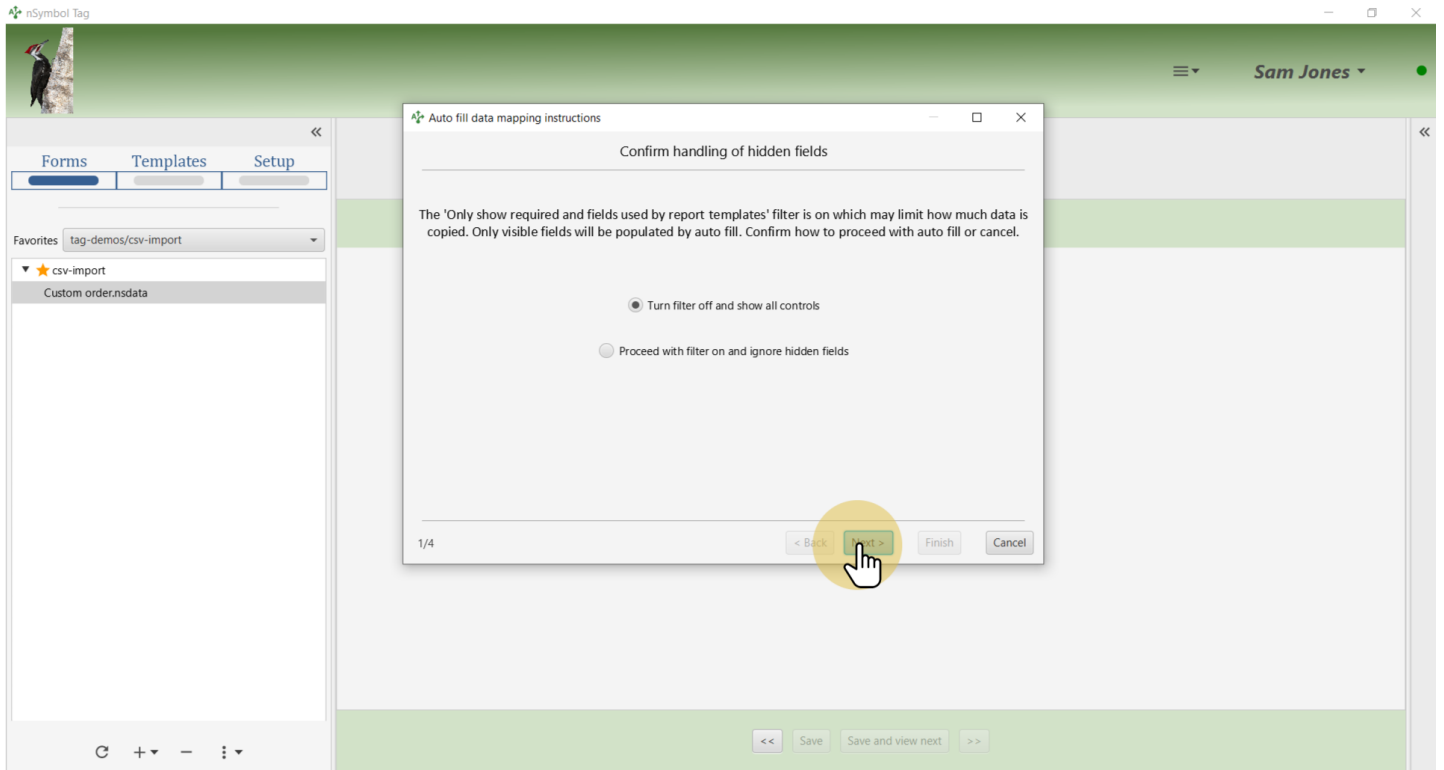
Use the *Copy data from CSV...* menu item under the *more menu* (3 vertical dots / *Auto fill*) to open a CSV import wizard.





10 Allow filter to turn off

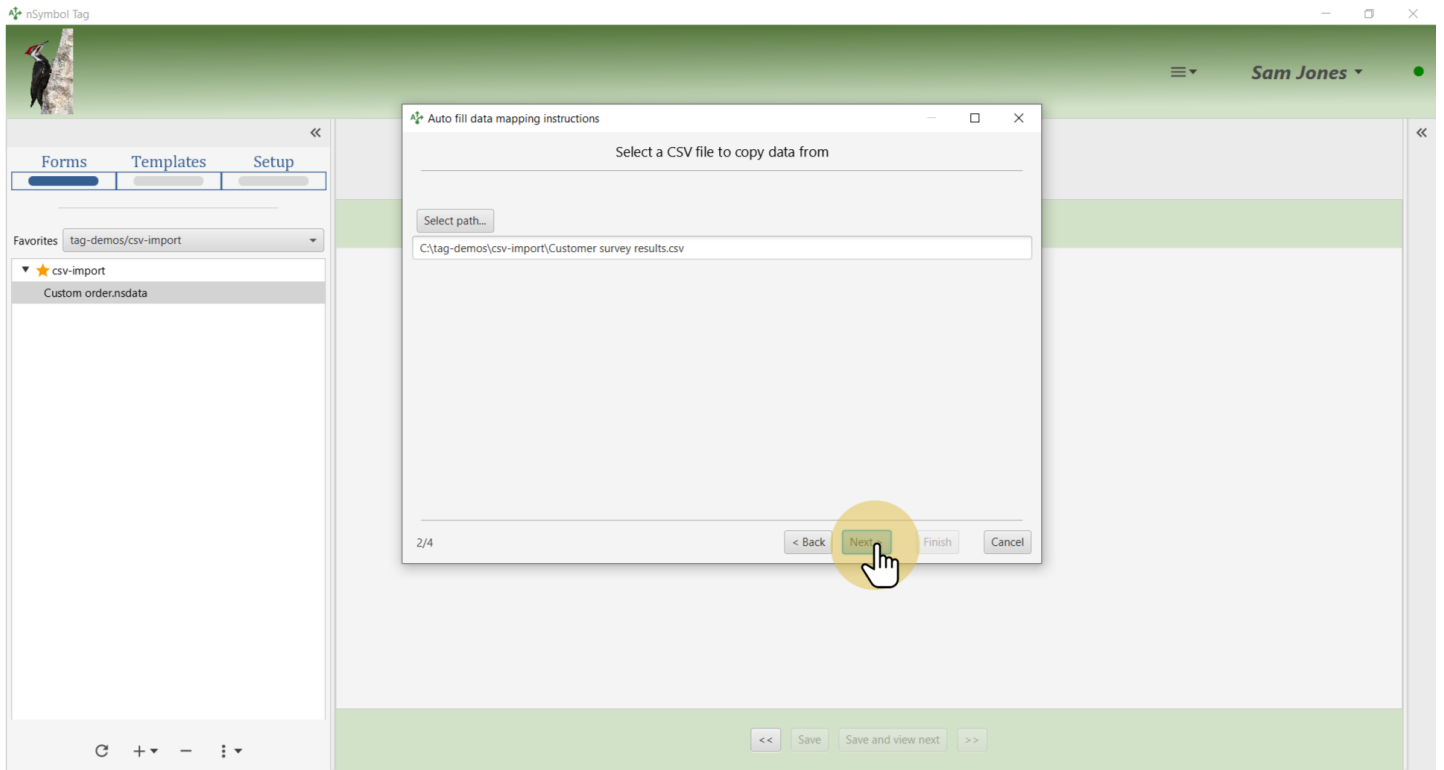
Accept the default option to turn off the form filter. This ensures all mapped data is copied even if it's not currently used in the report. Click Next.





11 Select CSV to copy from

Select the "Customer survey results.csv" file to copy data from using the *Select path...* button. Click *Next*.





12 Select row to copy

Select the first row to indicate which values will be copied into the form. Click *Next*.

The screenshot shows the nSymbol Tag application interface. A dialog box titled "Auto fill data mapping instructions" is open, with the subtitle "Specify which row to copy data from". The dialog contains a table with the following data:

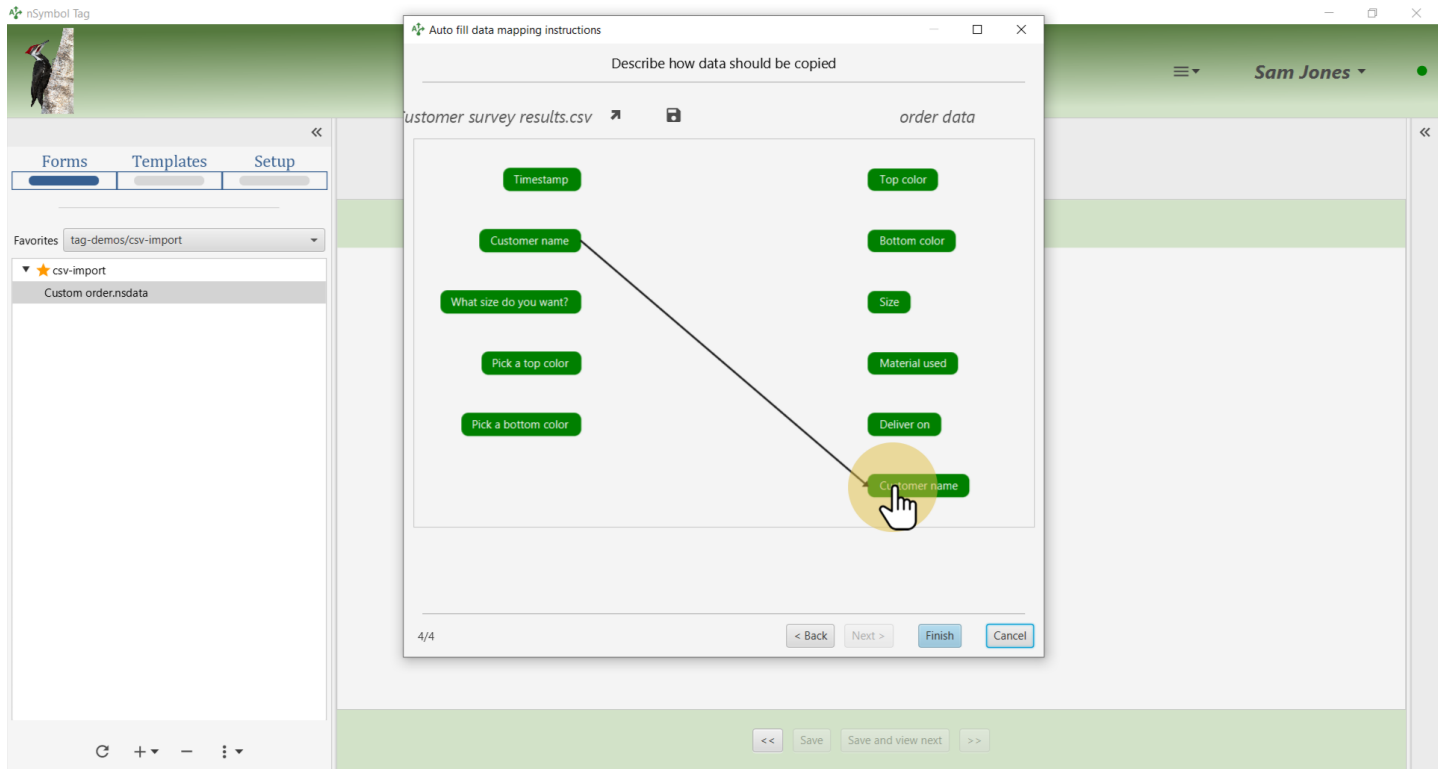
| Timestamp | Customer name | What size do you wa... | Pick a top color | Pick a bottom color + |
|-----------|----------------|------------------------|------------------|-----------------------|
| 5/14/2021 | Jack O'Lantern | large | green | blue |
| | | | | |
| | | | | |
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At the bottom of the dialog, there are four buttons: "< Back", "Next >", "Finish", and "Cancel". A hand cursor is pointing to the "Next >" button. The background application shows a sidebar with "Forms", "Templates", and "Setup" tabs, and a main area with a "Custom order.nsdata" form.



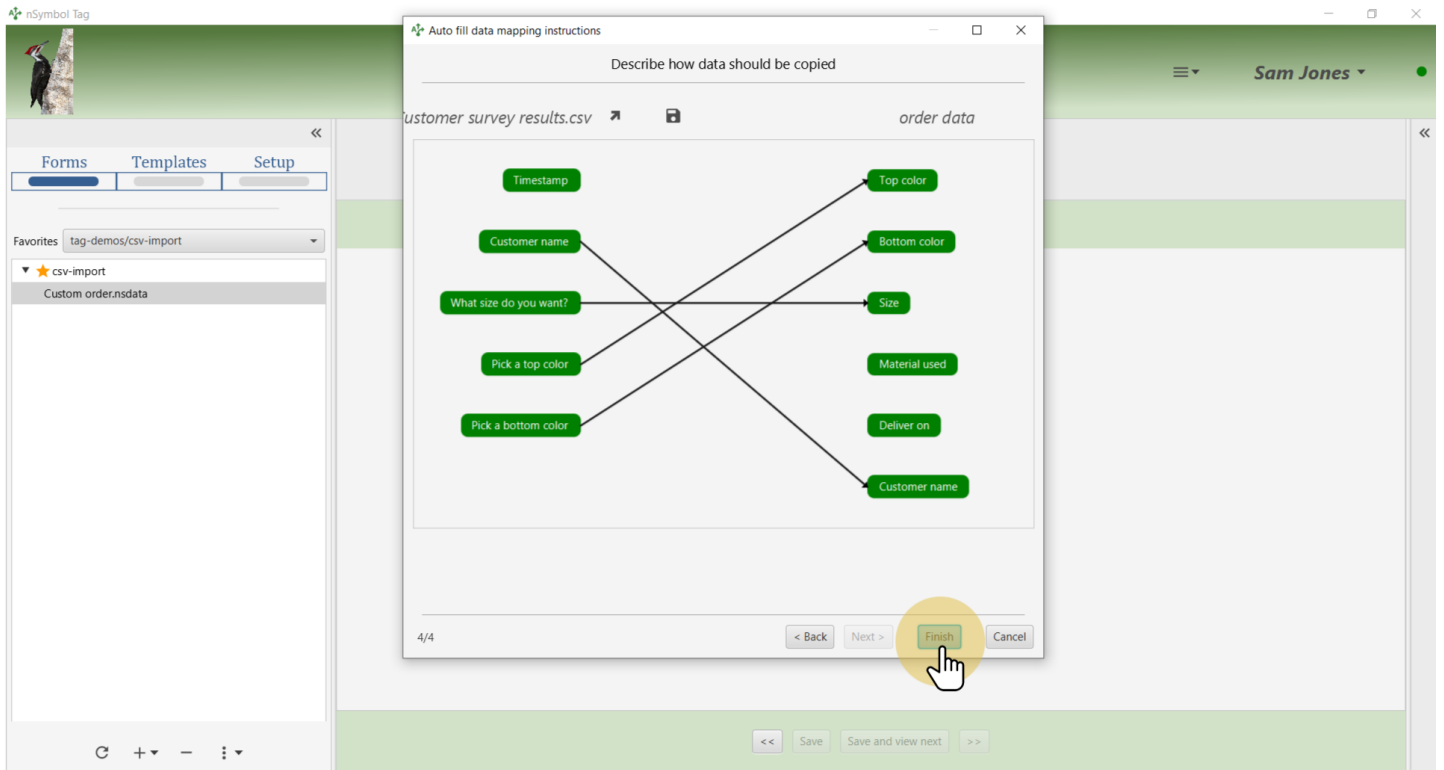
13 Map CSV columns to fields

Click on a column name in the CSV and then on the corresponding field in the order data. A line will show this mapping and allow you to change or delete it. Repeat until all fields are mapped.



14 Confirm all mappings

When all mappings are correct click the *Finish* button to copy data into the form.





15 Complete remaining fields

Four field values were copied from the CSV. Fill in the remaining two fields to complete the order.

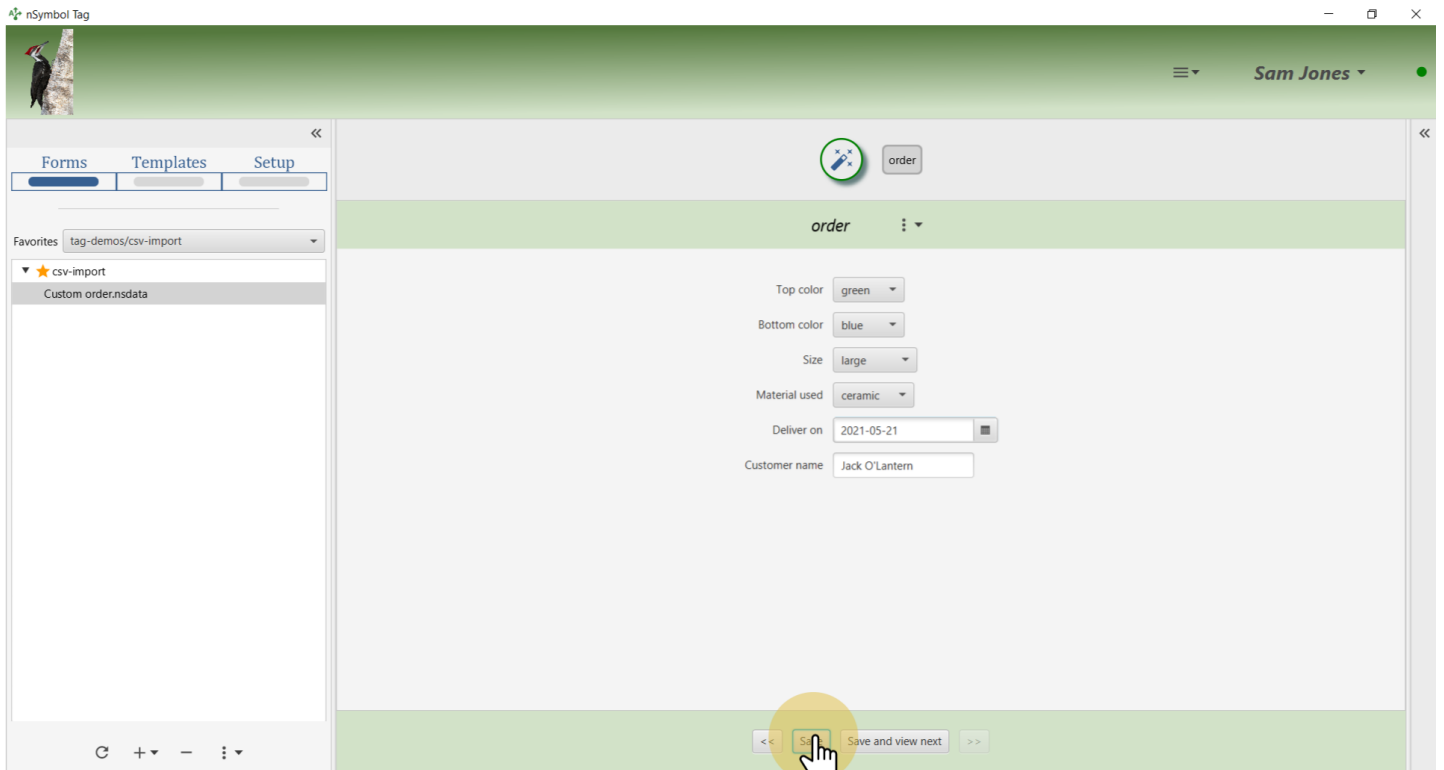
The screenshot shows the nSymbol Tag application interface. On the left is a sidebar with a 'Forms' tab selected, showing a list of favorites including 'tag-demos/csv-import' and 'csv-import' with a sub-entry 'Custom order.nldata'. The main area displays an order form for 'order'. The form fields are:

- Top color:
- Bottom color:
- Size: (highlighted with a yellow circle and a hand cursor)
- Material used:
- Deliver on:
- Customer name:

At the bottom of the form are navigation buttons: '<< Save Save and view next >>'. The top right of the application shows the user name 'Sam Jones'.

16 Save data

Click the Save button to save the merged data to disk.



17 All done

That's it for this guide. Now you can run the report, or use the data for other purposes (e.g., to help process the order).

