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## Mission Control: Bulk Updating Custom Fields

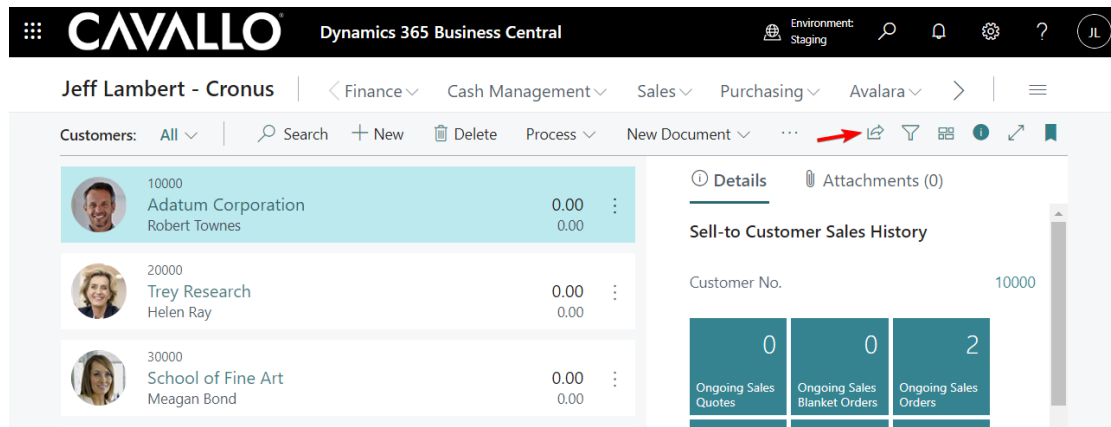
Cavallo Support - 2024-11-22 - [Mission Control Documentation](#)

### Bulk Updating Custom Fields

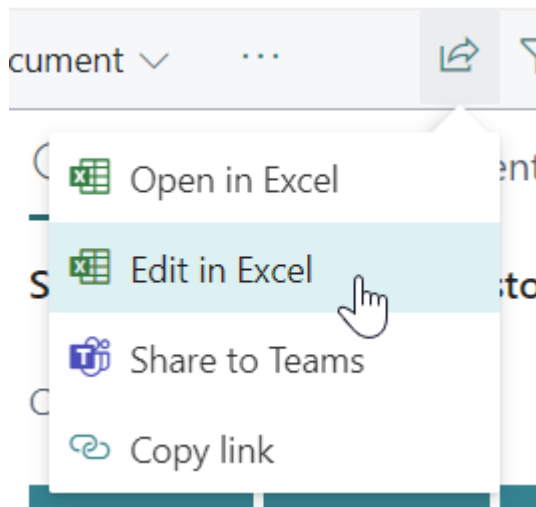
While there are no tools in Cavallo that will easily allow you to bulk update any of your new Custom Fields, you can use the existing functionality in BC to process a bulk update. Below are two options for doing bulk updates using tools in BC.

### Using a Microsoft Excel Plug-in

Navigate to Microsoft Business Central application and open up the desired section of the platform where you would like to make the updates. On that page look for the export button:

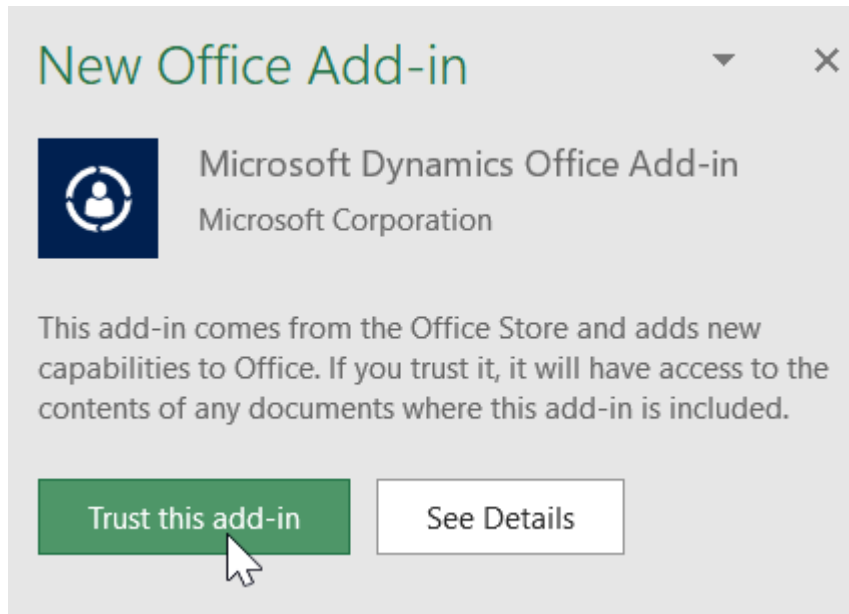


Select the Edit in Excel option:

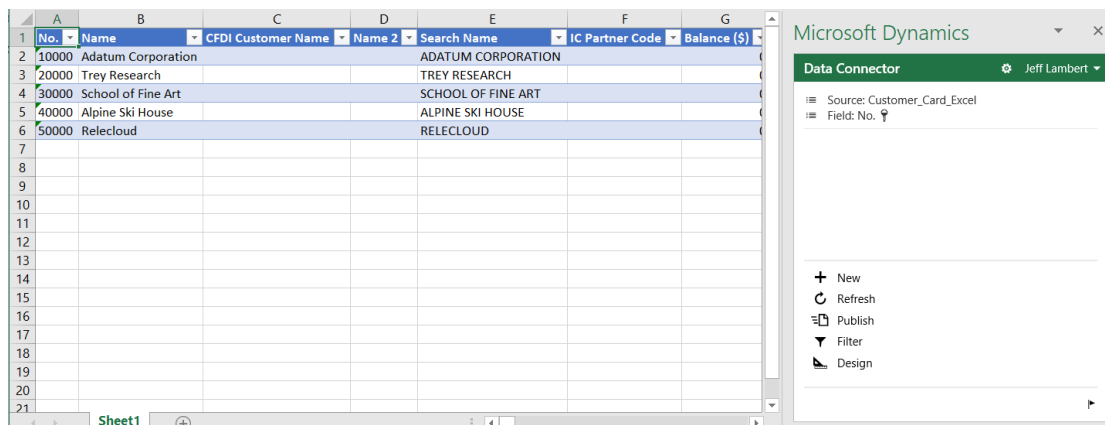


This will download an Excel file (in xlsx format). Once the file has been downloaded, open it and click the warning at the top to "Enable Editing". You will need to allow the Add-in to allow for Microsoft Dynamics Office

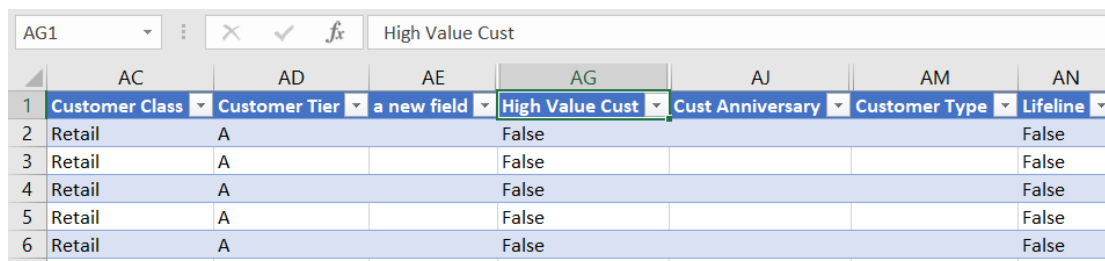
Add-in for this method to properly function.



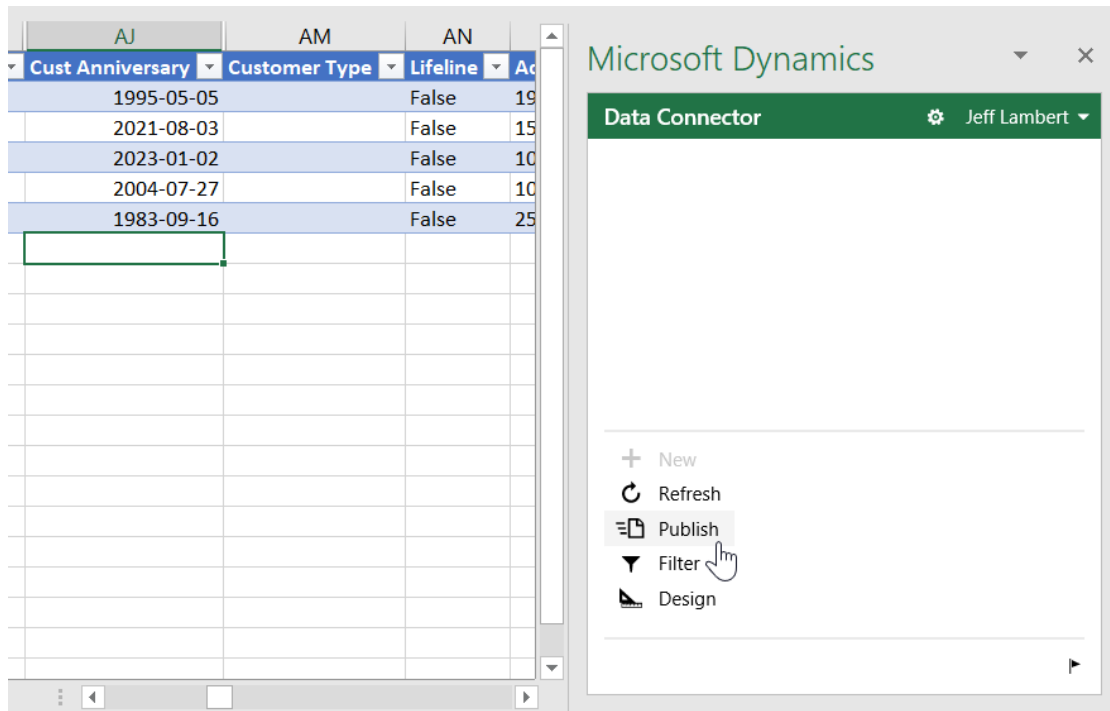
When the Add-in is turned on, the table will refresh automatically with the data that you have already entered into BC. You should see the Custom Fields that you have already created in Cavallo.



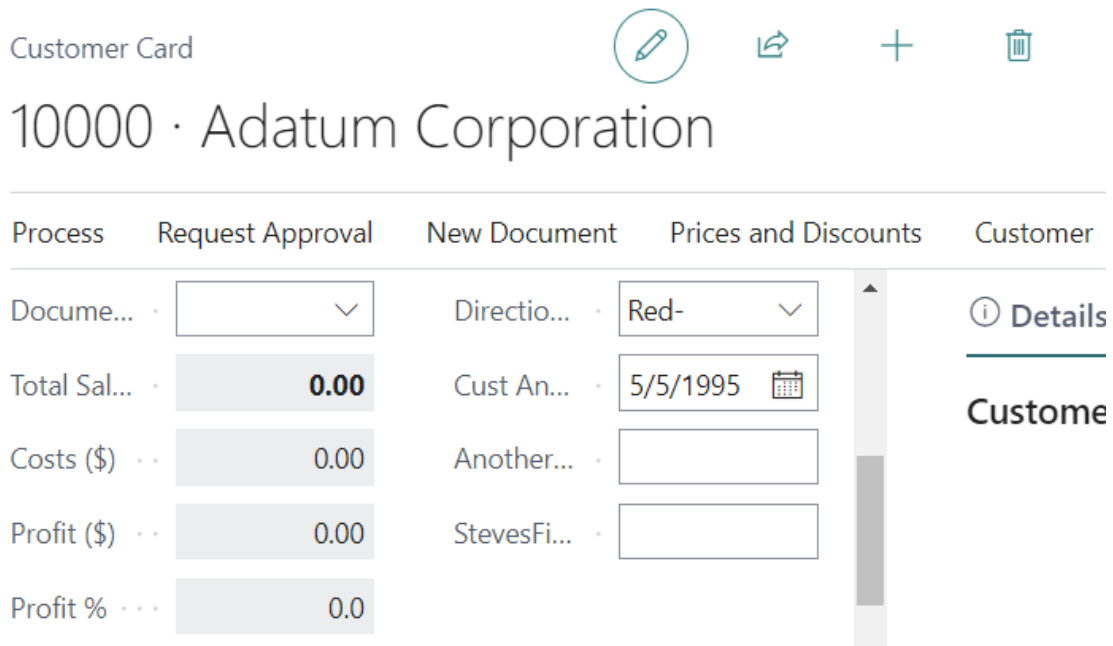
Custom Fields showing in the Excel file:



Once you have updated the fields that you wanted you will need to click the "Publish" button in the add-in to push the data back into BC:



After Publishing the data, you will need to refresh your BC screen and can now see that the fields have been updated:

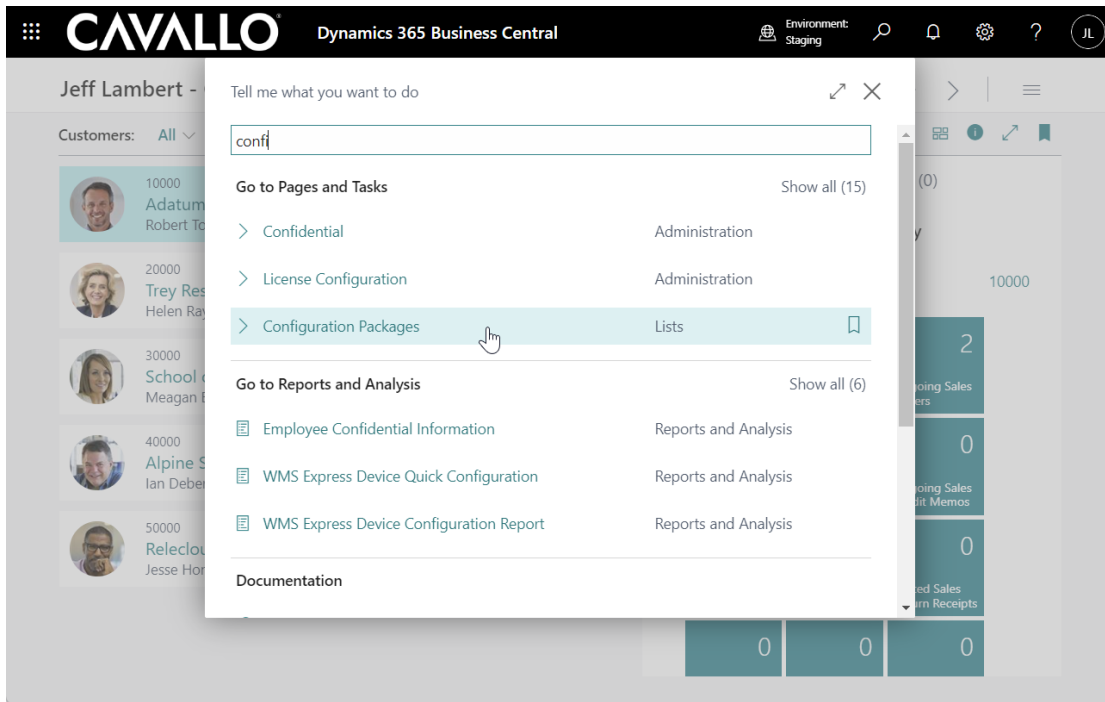


Article explaining process:

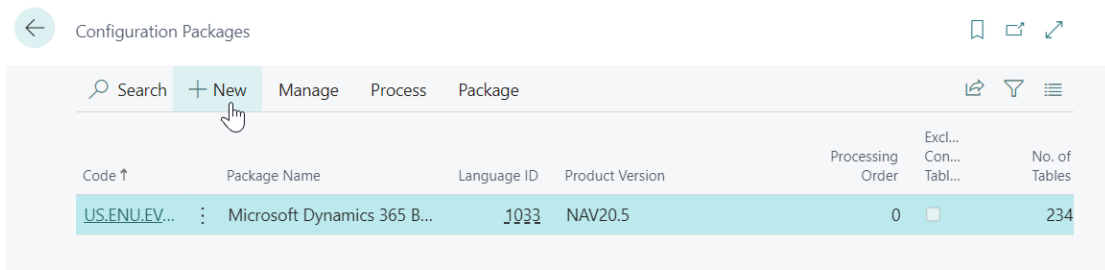
- [Microsoft - Import Business Data from Other Finance Systems](#)

## Using BC's Import/Export functionality

In Business Central, locate the search icon and search for "Configuration Packages":



Click the “+ New” option to create a new import:



Create a new Code and Package Name:

## Config. Package Card

[Apply Package](#)
[Validate Package](#)
[Import from Excel](#)
[Export to Excel](#)
[Get Tables...](#)

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**General**

Code ..... 
 Language ID .....

Package Name ..... 
 Processing Order .....

Product Version ..... 
 Exclude Config. Tables ...



Click the first line of the Table, and then click the three dots

Tables | Manage Table Functions Excel Fewer options

Table ID ↑	Table Name	Parent Table ID	Data Ten
→ 0		0	



On the popup, select the table(s) that you want to pull into your bulk upload. Most likely you will only want to update one of the following four tables:

- 18 - Customer
- 27 - Item
- 36 - Sales Header
- 37 - Sales Line

Objects | 🔍 ⌵ ...

ID ↑	Object Caption
11	Country/Region Translation
13	Salesperson/Purchaser
14	Location
15	G/L Account
17	G/L Entry
→ 18	Customer
19	Cust. Invoice Disc.
21	Cust. Ledger Entry

OK Cancel



Once you have the table selected, then select Table > Fields to edit the fields that you want included in the flat file that will be downloaded to your computer for editing.

Tables | Manage Table Functions Excel Fewer options

Package Data Database Data Errors Fields Filters Processing Rules

Table ID ↑	Table Name	Parent Table ID	Data Template	as Col...	Table Trig...	Bef... Pro...	No. of Package Record
→ 18	Customer	0		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	



## Edit - Config. Package Fields - Customer



Search Edit List Move Up Move Down Set Included Clear Included ...

Dim...	Field ID	Field Name	Incl... Field	Vali... Field	Processing Order ↑	Relation Table ID	Relation Table Capt
→	<input type="checkbox"/>	1	No.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1	
	<input type="checkbox"/>	2	Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	2	
	<input type="checkbox"/>	3	Search Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	3	
	<input type="checkbox"/>	4	Name 2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4	
	<input type="checkbox"/>	5	Address	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5	
	<input type="checkbox"/>	6	Address 2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	6	
	<input type="checkbox"/>	7	City	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	7	225 Post Code
	<input type="checkbox"/>	8	Contact	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8	
	<input type="checkbox"/>	9	Phone No.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	9	
	<input type="checkbox"/>	10	Teleph No.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	10	

Close

Given the number of fields that come by default, it is easiest to click "Clear Included" and then scroll down to the Cavallo field section of the list (typically starting around 60000):

## Edit - Config. Package Fields - Customer



Search Edit List Move Up Move Down Set Included Clear Included ...

Dim...	Field ID	Field Name	Incl... Field	Vali... Field	Processing Order ↑	Relation Table ID	Relation Table Capt
	<input type="checkbox"/>	64028	COREMediaLink	<input type="checkbox"/>	<input type="checkbox"/>	115	
	<input type="checkbox"/>	64053	COREPrimaryAddressCode	<input type="checkbox"/>	<input type="checkbox"/>	116	222 Ship-to Address
	<input type="checkbox"/>	64054	CORECurrencySymbol	<input type="checkbox"/>	<input type="checkbox"/>	117	
	<input type="checkbox"/>	64065	CORECurrencyCodeDisplay	<input type="checkbox"/>	<input type="checkbox"/>	118	
	<input type="checkbox"/>	64122	CORECurrencyISOCode	<input type="checkbox"/>	<input type="checkbox"/>	119	
	<input type="checkbox"/>	95629	CAVALLO_UDF_test_applies_to	<input type="checkbox"/>	<input type="checkbox"/>	120	
	<input type="checkbox"/>	95630	CAVALLO_UDF_test_field	<input type="checkbox"/>	<input type="checkbox"/>	121	
	<input type="checkbox"/>	95631	CAVALLO_UDF_another_test_fiel	<input type="checkbox"/>	<input type="checkbox"/>	122	
	<input type="checkbox"/>	95632	CAVALLO_UDF_allthethingstext	<input type="checkbox"/>	<input type="checkbox"/>	123	
	<input type="checkbox"/>	95633	CAVALLO_UDF_test_...text	<input type="checkbox"/>	<input type="checkbox"/>	124	

Close



Select the fields that you want to have included in the file then click close.

From here you will then want to click the Export to Excel button and download the file. Once you have the file downloaded, you can edit any/all of the field values and then come back into BC to upload the updated file using the Import from Excel button.

# Config. Package Card

Apply Package | Validate Package | Import from Excel | **Export to Excel** | Get Tables...

## General

Code	NEWCUSTUPLOAD	Language ID	0
Package Name	New Cust Upload for 5.5.23	Processing Order	0
Product Version		Exclude Config. Tables	<input checked="" type="checkbox"/>

## Tables

Manage | Table | Functions | Excel | Fewer options

Table ID ↑	No. of Fields Available	No. of Fields Included	No. of Fields to Validate	No. of Package Errors	No. of Database Records	Filter
→ 18	190	6	6	0	5	



Once you have the configuration package card configured, you will be able to download the file and reupload as needed.

Article explaining process:

- [Encore Blog - How to Easily Import Data into Dynamics 365 Business Central](#)