

# Business One in Action - Creating a Template for a User-Defined Table in Data Transfer Workbench



## Applies to:

SAP Business One, [Logistics](#), [Stock](#)

## Summary:

This article explains how to create and populate templates for DTW and more specifically for User Defined Tables.

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**Created on:** May 2010

## Author Bio:

Murielle Saliber joined SAP in 2002 and is currently active as Senior Support Consultant for SAP Business One. She has worked as both technical and business consultant. She authored this article as a direct response to a partner enquiry during the Expert-on-Phone project, where she consulted on mainly logistics, administrative, printing and data migratory topics.

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## Creating a template for a User-Defined Table in Data Transfer Workbench

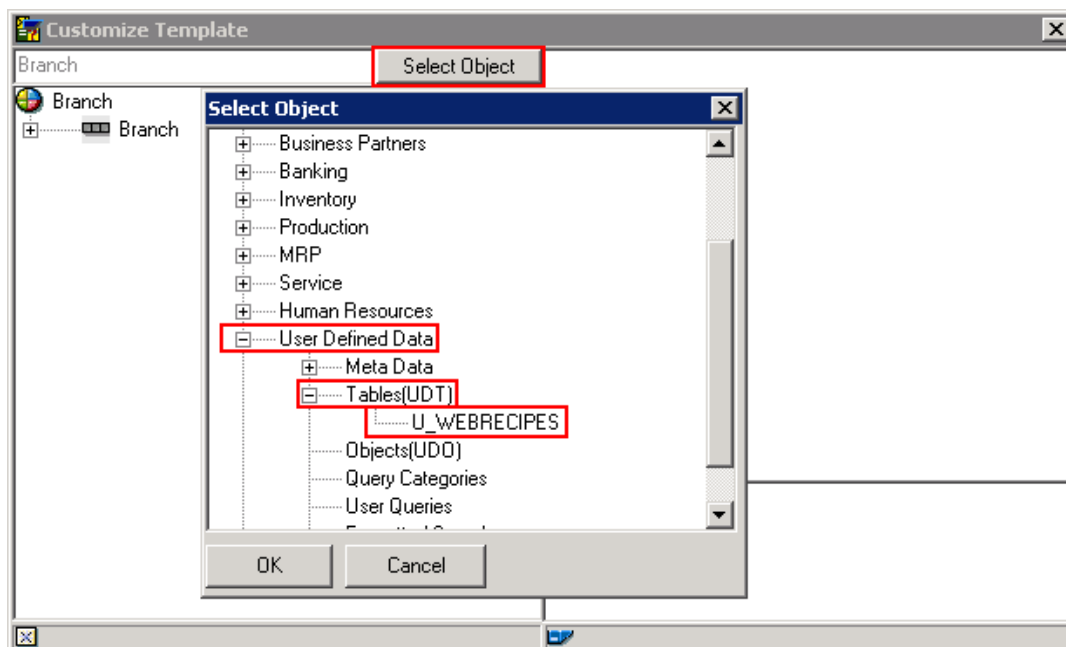
When a *User Defined Table (UDT)* is created in SAP Business One, it might be necessary to upload a batch of data into this table. This may be achieved by employing the *Data Transfer Workbench (DTW)*.

Since any *UDT* is defined by the user, there are no predefined templates available. However, once the user is logged in the *DTW* and connected to the database, it is possible to create or recreate a template for every object exposed in the *Data Interface (DI)*.

### How to create the template

The template can be created from the *Template* menu in the *DTW*. *Templates -> Customized Templates*, or, using CTRL+M. This opens the customized template window from where all available objects can be selected.

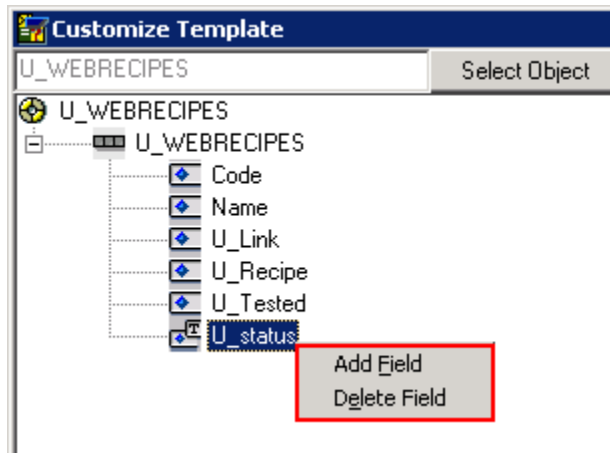
Clicking on the *Select Object* button opens the list of objects by functionalities. All user defined fields, tables, objects, queries and so on are available under the *User Defined Data* section.



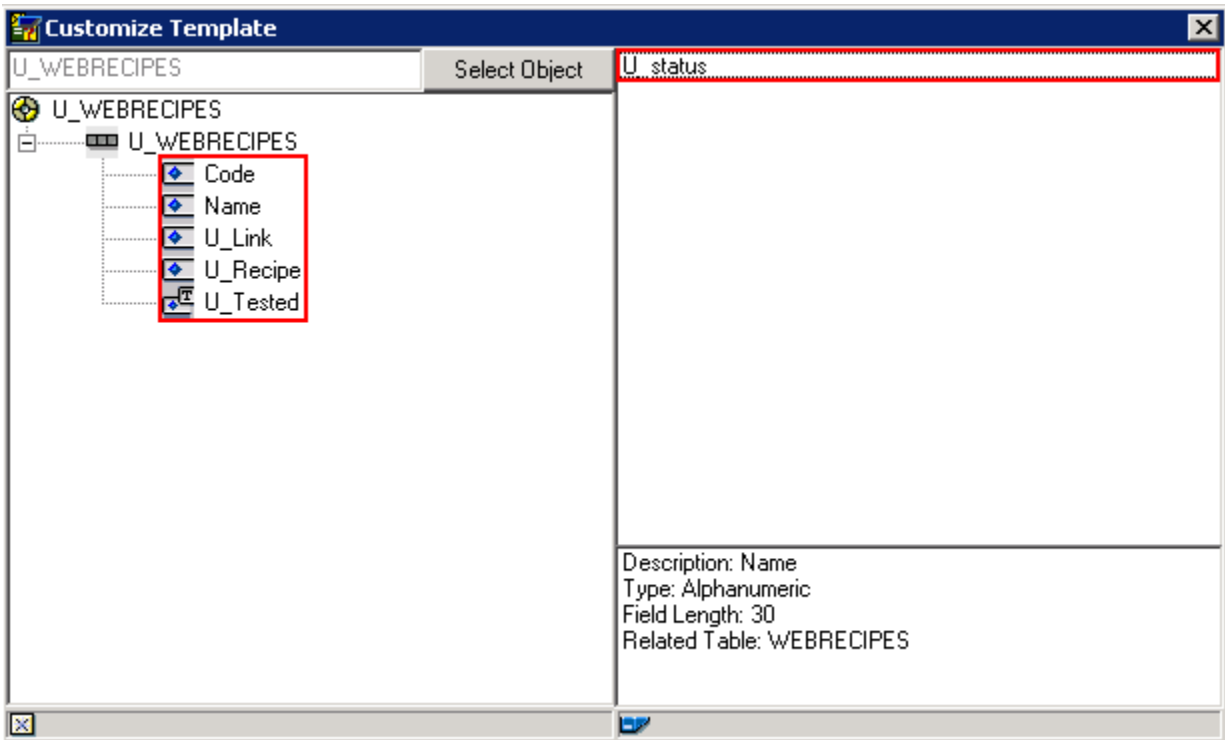
In *DTW*, the *UDTs* are displayed with the prefix 'U\_' unlike SAP Business One where the prefix used is '@'. It is similar to a *User Defined Field (UDF)* in the application.

Once the object is selected, the interface displays the column headers of the *UDT* and the user can choose which fields should be present in the ensuing template.

It is possible to delete unnecessary columns within the template without modifying the structure of the table. That is to say that it does not lead to a deletion of the column from the actual *UDT*. In order to modify the list, do a right-click on the column header, and select *Delete Field*.



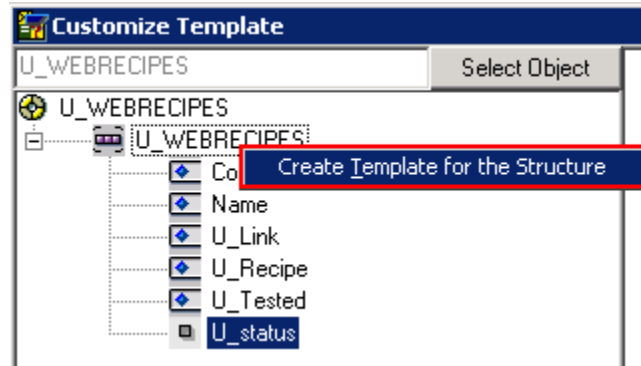
In the example below the field *U\_status* has been deleted and placed in the right top section of the *Customize Template* window. It is possible to include it again in the design of the template by right clicking in the window and selecting *Add Field* or simply double-clicking on it.



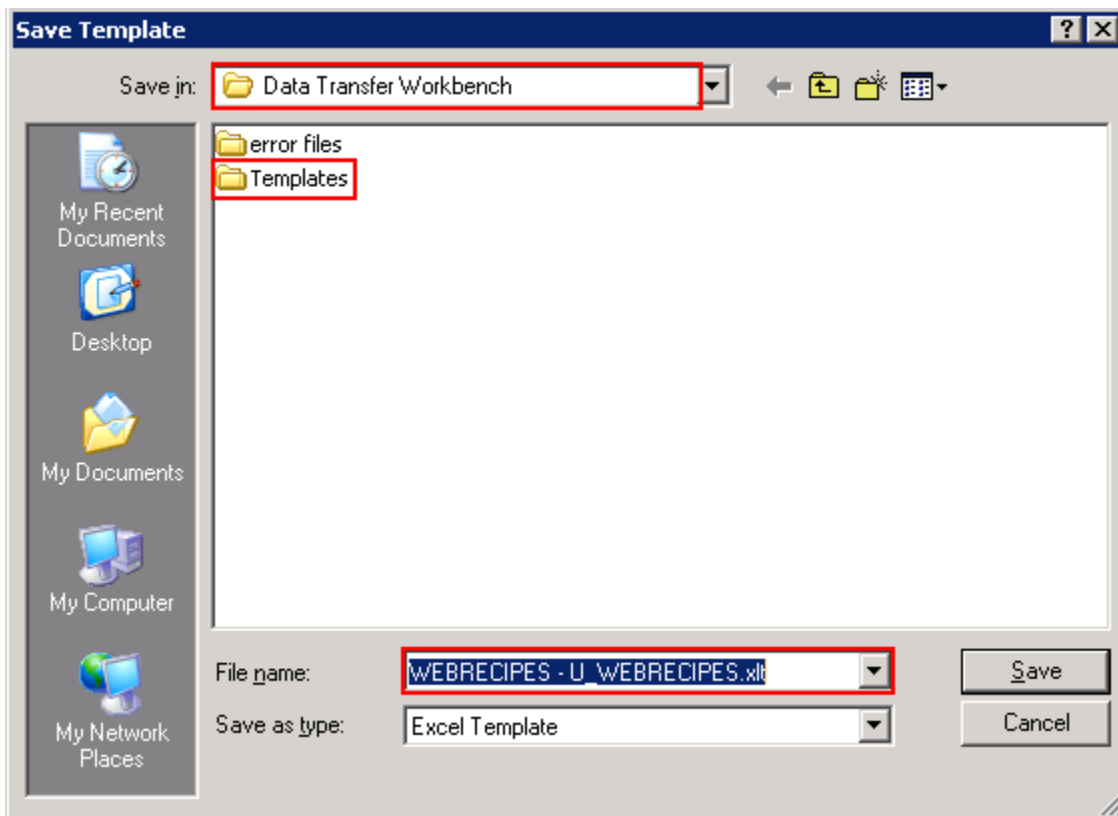
It is possible to organise the columns by dragging up or down the columns' title to the position in which they should appear in the template.

Note that all necessary information to help to fill in the template is available in the bottom right section of the customize template window. This information is copied as a comment in the template of the *UDT*.

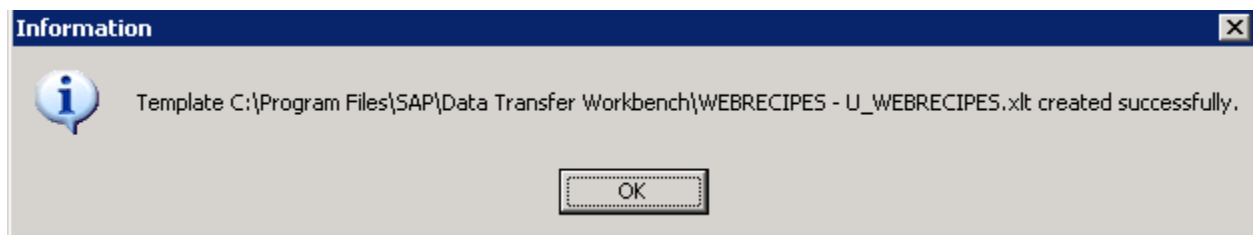
Once all required column headers have been selected, a right click on the table name will facilitate automatic template creation:



The user will be prompted to assign an appropriate designation to the template and choose a location to where it should be saved to:



After clicking on Save the application will display the following message:

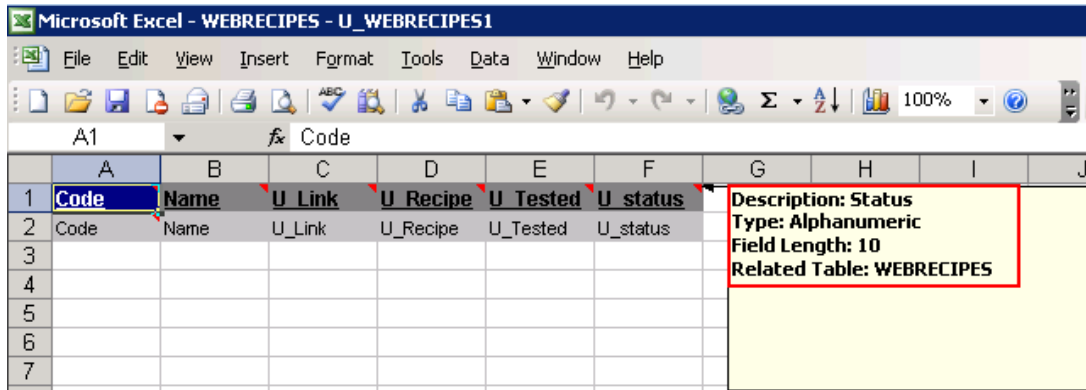


The new template is now created and may be used to import data into the *UDT* using the *DTW*.

## How to populate the template

In the *UDT* both *Code* and *Name* are primary and mandatory fields.

All the necessary information to fill the template is now available in the comments on the first row of each column in the template.

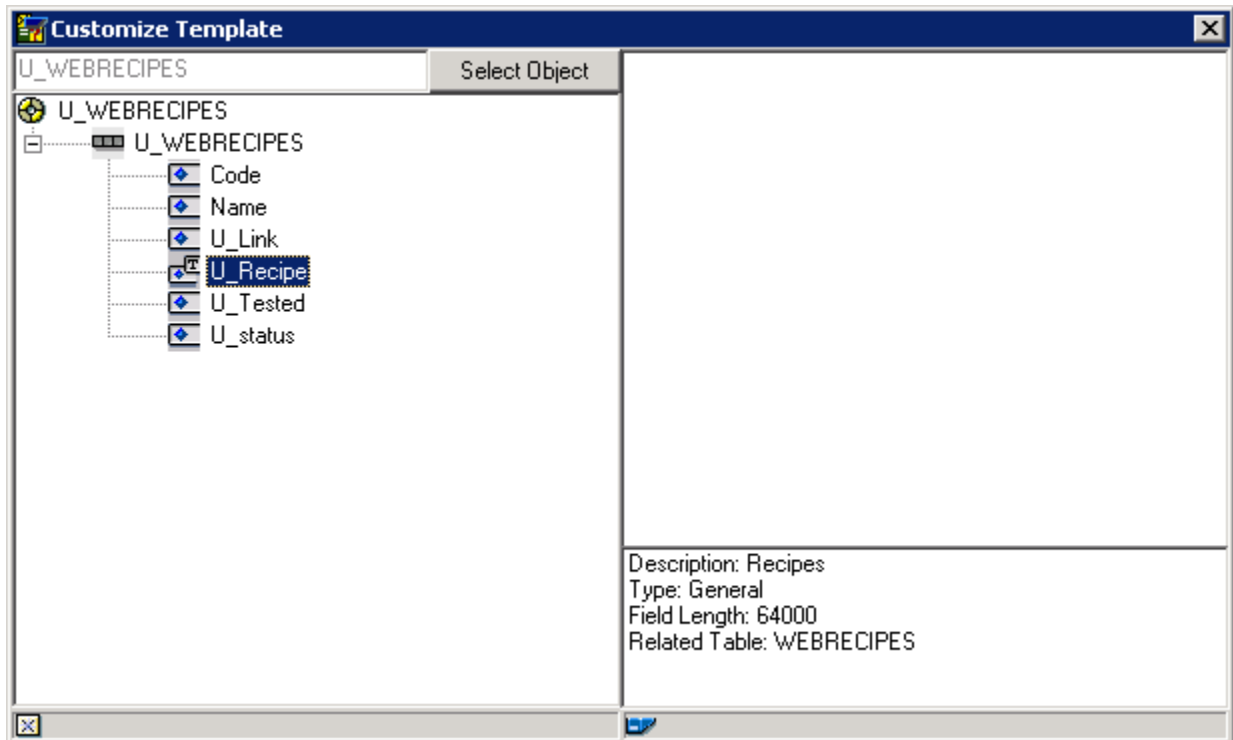


Alternatively it is possible to use the information from the SAP Business One *GUI*. The data type of the column always depends on the setting of the *UDF*. They can be found in SAP Business One-> Tools-> Customisation Tools -> User Defined fields ->Management -> User Tables

Category	Title	Description	Type	Dflt	Mand.	Index	Linked Table
▶ Master Data					<input type="checkbox"/>	<input type="checkbox"/>	
▶ Marketing Documents					<input type="checkbox"/>	<input type="checkbox"/>	
▶ Payments					<input type="checkbox"/>	<input type="checkbox"/>	
▶ Production					<input type="checkbox"/>	<input type="checkbox"/>	
▶ Accounting					<input type="checkbox"/>	<input type="checkbox"/>	
▶ Costing					<input type="checkbox"/>	<input type="checkbox"/>	
▶ Budget					<input type="checkbox"/>	<input type="checkbox"/>	
▶ Sales Opportunities					<input type="checkbox"/>	<input type="checkbox"/>	
▶ Service					<input type="checkbox"/>	<input type="checkbox"/>	
▶ Stock					<input type="checkbox"/>	<input type="checkbox"/>	
▶ Tax Invoice					<input type="checkbox"/>	<input type="checkbox"/>	
▶ Value Added Tax					<input type="checkbox"/>	<input type="checkbox"/>	
▼ User Tables					<input type="checkbox"/>	<input type="checkbox"/>	
▼ Web Recipes					<input type="checkbox"/>	<input type="checkbox"/>	
	Link	Link	Link		<input type="checkbox"/>	<input type="checkbox"/>	
	Recipe	Recipes	Text		<input type="checkbox"/>	<input type="checkbox"/>	
	Tested	Tested/Status	Alphanumeric (10)	N	<input type="checkbox"/>	<input type="checkbox"/>	
	status	Status	Alphanumeric (10)	R	<input type="checkbox"/>	<input type="checkbox"/>	

The window provides the type of field which gives an idea of the type of data and length expected for each field. In case of an alphanumeric field, the permissible character number is shown in brackets.

This information is also available in the *Customized Template* window of the *DTW*, once the user selects the column's header name.



## Related Contents

- [SAP Business One in Action Catalog Page](#)
- [Link to DRC](#) documentation
- Note [1227722](#)
- For more information, visit the [Business One homepage](#).



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