Unit: Implementation Tools

Topic: Quick Copy

In this exercise, you will copy business partner and item master data records from one SAP Business One company to another company.

Important: Before you start the exercise, you need to identify your source and target companies. The companies must have the same localization. If necessary, create a new company with the same localization as your source company. **Note:** If you are not able to create a new company, you can copy the *Customization* category to a company with a different localization.

1-1 Copy Data to a File (Export)

Log in to the source company.

From the Main Menu, choose *Administration → System Initialization → Implementation Center → Implementation Tasks → Copy Data Between Companies.*

In the Quick Copy window, select **Copy to File** and choose **Browse** to enter a name for the qdf file.

Select one of the error handling options.

The **OK** button will now become active. Choose OK.

The **Data Categories** on the left-hand side are now selectable.

Expand the *Business Partners* hierarchy.

Select the checkbox for the *Business Partner Master Data* category.

If you select the row, the business partner master records will display on the right. They will automatically be selected for copying.

Expand the *Inventory* (Stock) hierarchy.

Select the checkbox for the *Item Master Data* category and select the row to display the records selected for copying.

Choose **Export.**

A window will open showing any data dependencies. For example, there will be dependencies on BP Groups, Currencies, Item Groups and item warehouses.

To view the actual dependent records, select the link arrow for one of the dependent rows.

Note: The dependent records will be copied by default with the master data records.

Choose **Continue.**

The copy will start and the copy progress will show in the status bar at the bottom of the screen.

The Quick Copy log will show the actual number of records exported to the qdf file.

Close the Quick Copy windows. The system will prompt you to save a project file. This is optional. If you choose **Yes,** enter a name for an xml file that saves the settings and selected categories. Note that you can only reuse the xml file in the source company.

1-2 Copy Data from a File (Import)

Log in to the target company.

From the Main Menu, choose *Administration → System Initialization → Implementation Center → Implementation Tasks → Copy Data Between Companies.*

In the Quick Copy window, select **Copy from File** and choose **Browse** to select the qdf file you saved in step **1-1**. Choose **Open**.

Select one of the **Copy Method** options.

Select one of the **Error Handling** options for responding to errors.

Note: If the selected records contain user-defined fields, the category *Customization > User-Defined Data > User-Defined Fields* is automatically selected as a dependent category and the UDFs will be copied. If you do not want to copy the UDFs from the source company, you must select the option to ignore missing UDFs, otherwise the import will fail.

Select one of the **Copy Options**:

- The first option determines the response of the application when copying objects with assigned accounts:
  - *Use Accounts in Source* – If the source accounts also exist in the target, then the application copies the account assignments from the object in the source to the object in the target. However, if the source accounts do not exist in the target, then the application encounters an error during the copy process.
  - *Use Default Accounts in Target* – The application assigns the default accounts in the target to the object, and does not copy the source assignments.
- The next option determines whether a blank field will overwrite a non-blank field when target records are being updated.

Important! For this exercise, deselect the *Force Backup* checkbox.

Choose **OK**.

The selected data catgeories from the copy file are displayed on the left. You can select the Business Partners and Inventory categories to check the individual records to be copied.

Choose **Import.**

Check for any error messages in the system messages log.

Note: To review the log later, open Quick Copy and choose *Open Log File* from the **Quick Copy** menu on the top menu bar.

1-3 Validate the data

Check the item and business partner master data records in the target company.