Welcome to the topic on importing business partner master data using the Data Transfer Workbench.
In this course, you will see how to import business partner master data, using the Data Transfer Workbench.
Business Scenario

- You need to import business partner records from a legacy system into a new company.
- The records have been extracted into a spreadsheet.
- The master data includes additional fields that have been added as user-defined fields.

**Solution:** Use the Data Transfer Workbench to import data into business partner objects.

In this business scenario, you need to import business partner records from a legacy system into a new company database.
The records have been extracted into a spreadsheet.
The master data has some additional fields that have been added to the master data object as user-defined fields.
Using the Data Transfer Workbench, you can import data into business partner objects and user-defined fields.
The business partner object as displayed on screen uses multiple tables. In the Data Transfer Workbench, multiple templates are provided for the import of data into the tables. Some of the tables are shown here, but you should check the template folder to see all available templates.

Each template is named for the table that it updates. The parent template updates the OCRD table, allowing you to import fields in the header and on the General and Payment Terms tabs of the object.

You can use the child templates to import data into other tables for the object, for example, the OCPR table for importing contact persons.
In the parent template OCRD you specify core information for the business partner, such as the code and name.

- The card type field identifies if the business partner is a customer, supplier, or lead. The default card type is for a customer, therefore you can leave this field empty if you are importing customer records.

- The group code assigns the business partner to a customer or vendor group. If you leave the group code blank in the template, the group will default to the first customer or vendor group in the system, for example 100 for customers or 101 for vendors/suppliers. If you enter a group code, use the code from the related table OCRG (the Customer or Vendor groups table).

- The business partner currency will default to the local currency. If you enter a currency, use the 3 digit international currency symbol as defined in the currencies table in the system.

- The payment terms will default in from the General Settings.

- If the business partner group has an associated price list, that price list will be the default. If there is no price list associated with the group, the price list will be taken from the default payment terms.
To import contact information on the Contact Persons tab of the master data, use the child template OCPR, and enter each contact on a separate row. You can import multiple contacts for a business partner.

The child template references the parent template row using the card code field.
You can specify one billing and a shipping address in the parent template OCRD. These addresses become the default addresses.

To import multiple addresses for a business partner, use the child template CRD1. In the CRD1 template, enter each address on a separate row and use the AddressName field to label each address.
You can use the child templates to update individual contacts or addresses in an existing master data record.

In the child template, you identify the contact or address to be updated by entering the LineNum field. The LineNum field is entered as an integer: 0 for the first row, 1 for the second row, and so on. Generally the rows match the order of the original import; however, you should verify the row for a contact or address by running a query on the OCPR or CRD1 table.

You can add a new contact or address row to an existing business partner record by setting the LineNum value appropriately so that it does not update an existing row.

You do not need to include the parent template OCRD when you update individual rows. Remember to choose the option to “Update Existing Data” in DTW.
User-defined fields are often added to master data records to hold information specific to the company’s business processes. To import data into a user-defined field, simply add the name of the field to the end of the template, as shown here, and enter the data in the column. You must use the DTW to import data into user-defined fields; you cannot import into user-defined fields using the Import from Excel utility.
In this demo, you will see how to import business partner master data.
Here are some key points to take away from this course. Please take a minute to review these key points:

- Using the Data Transfer Workbench, you can import and update data in the business partners object.

- The business partner object uses several database tables, therefore multiple DTW templates are provided. The main template OCRD is required when importing a new business partner.

- Using the child templates, you can import multiple contact employees, addresses and business partner bank accounts for business partners.

- You can import child templates together with the parent, or separately. If you update separately, use the option “Update Existing Data”.

- You can import data into user-defined fields by adding the fields to the end of the template.

- To update information in a row, choose the option “Update Existing Data” and enter the LineNum field in the child template.
You have completed the topic for importing business partner master data using the Data Transfer Workbench.

Thank you for your time!