

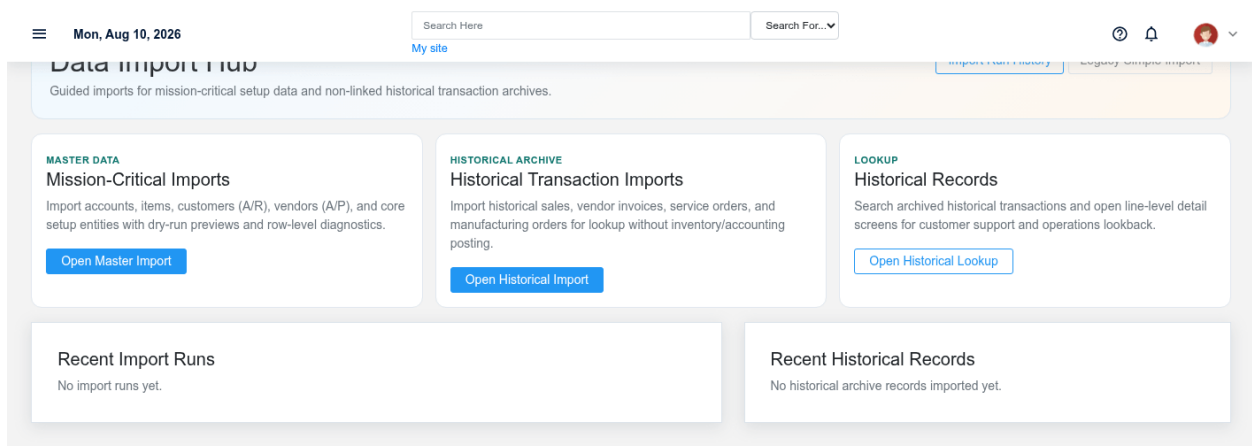
Data Import

Data Import

Purpose and when to use this screen

Data Import loads supported CSV datasets while preserving a run record, row-level diagnostics, source-system identity, and dry-run/apply distinction. Use it for controlled migration or conversion—not as a shortcut around normal validation or as a replacement for database restore.

Choose an import workflow



The Data Import start screen in the Brisk documentation demo.

Use **Master Data Import** for accounts, items, customers, vendors, payment terms, taxes, item classes, customer classes, and units of measure. Use **Historical Import** for archived business transactions that must remain searchable without becoming ordinary live operational records. Download/use the headers shown for the selected dataset rather than guessing column names.

Import master data

applying them.

Import historical data

The screenshot shows a web interface for 'Historical Transaction Import'. At the top, there's a navigation bar with a menu icon, the date 'Mon, Aug 10, 2026', a search bar, and a user profile icon. Below the navigation bar, there are two tabs: 'Import Hub' (active) and 'Historical Lookup'. The main content area is titled 'Historical Transaction Import' with a subtitle: 'Import non-linked historical transactions for lookup only. This importer does not post accounting or inventory activity.'

The interface is divided into two main sections. The left section contains a form for selecting transaction type and source system, a CSV file upload area, and checkboxes for import options. The right section displays a 'CSV Template' with a list of fields and a 'Recent Historical Runs' section at the bottom.

Historical Transaction Type: Other Historical Transactions | **Source System (Optional)**: [Dropdown]

For example: QuickBooks, NetSuite, Legacy ERP, or spreadsheet exports

CSV File: [Choose File](#) | No file chosen
Upload a CSV file with a header row (UTF-8, UTF-16, or Latin-1).

☒ Preview Only (No Changes) | ☒ Update Existing Records
☐ Strict Mode (All-or-Nothing) | ☒ Replace Existing History Lines

[Run Historical Import](#)

CSV Template
Use one row per transaction line item. Rows with the same **lookup_key** are grouped

[Download Historical Template](#)

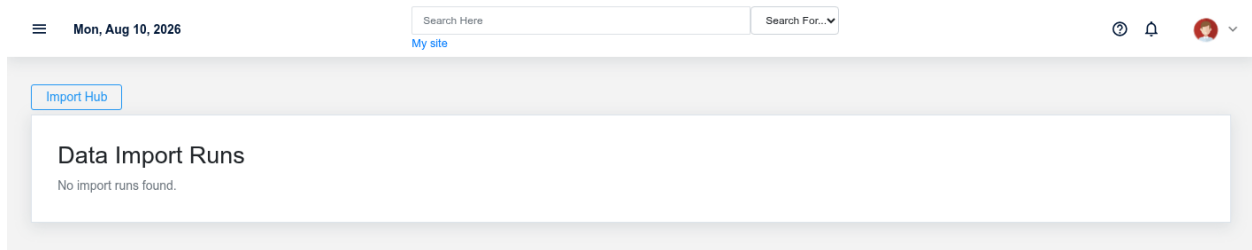
- lookup_key
- external_id
- document_number
- transaction_type
- transaction_date
- due_date
- status
- party_name
- reference
- currency
- subtotal
- tax_total
- total
- memo
- line_number
- item_code
- item_name
- description
- quantity
- uom
- unit_price
- line_total

Recent Historical Runs
No historical import runs yet.

The Data Import history screen in the Brisk documentation demo.

Select the transaction type, source system, and CSV. Start with dry run, verify external/document IDs, party, transaction date, reference, memo, amounts, and line detail. Decide whether an existing archive record may be updated and whether existing lines should be replaced. Historical archive entries support lookup and migration history; do not assume they post to inventory, receivables, payables, or the general ledger.

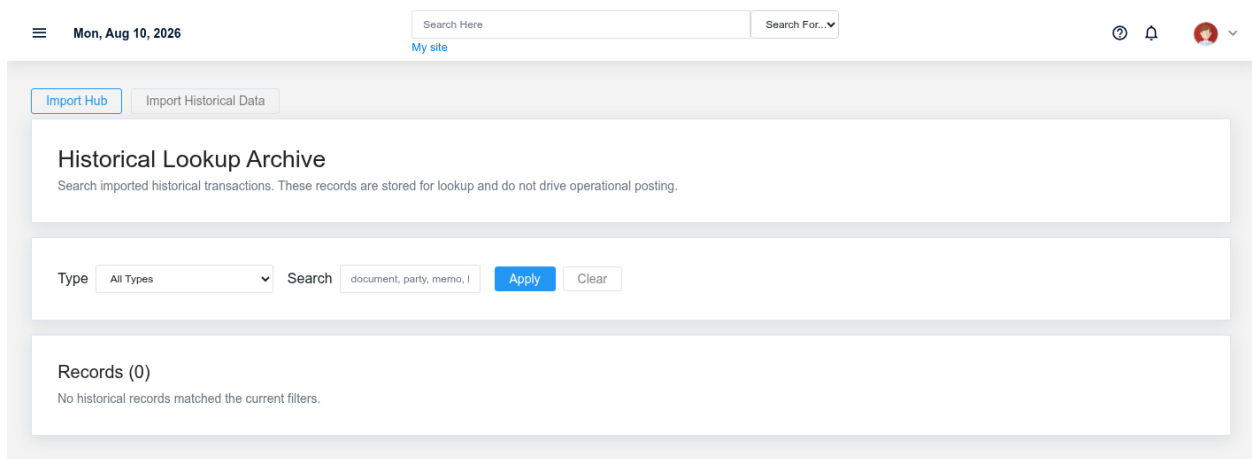
Review import runs



The Data Import runs screen in the Brisk documentation demo.

Open the saved run and review import type, dataset, filename, source system, options, timestamps, status, counts, lookup strategy, and up to the recorded row-level issues. Download failed rows, correct the source CSV, and retry from the run link so dataset/source context is preserved. Do not repeatedly apply the entire original file when only failed rows need correction unless the chosen upsert keys make that safe.

Look up imported history



The Data Import records screen in the Brisk documentation demo.

Filter Historical Lookup by transaction type and search document number, external ID, party, reference, memo, or lookup key. Open a representative sample across dates and transaction types and verify header/line totals and source identifiers. The archive retains up to the displayed search scope; use run/detail views for precise diagnostics.

Working safely and effectively

Back up the database and media first, test on a non-production copy, and retain the original file, transformed file, mapping rules, run IDs, approvals, and reconciliation results. After apply, verify record counts, duplicates, relationships, balances, permissions, and representative downstream screens/reports. Roll back by restoring the tested backup when the import's effects cannot be safely and completely reversed through normal records.

Revision #3

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