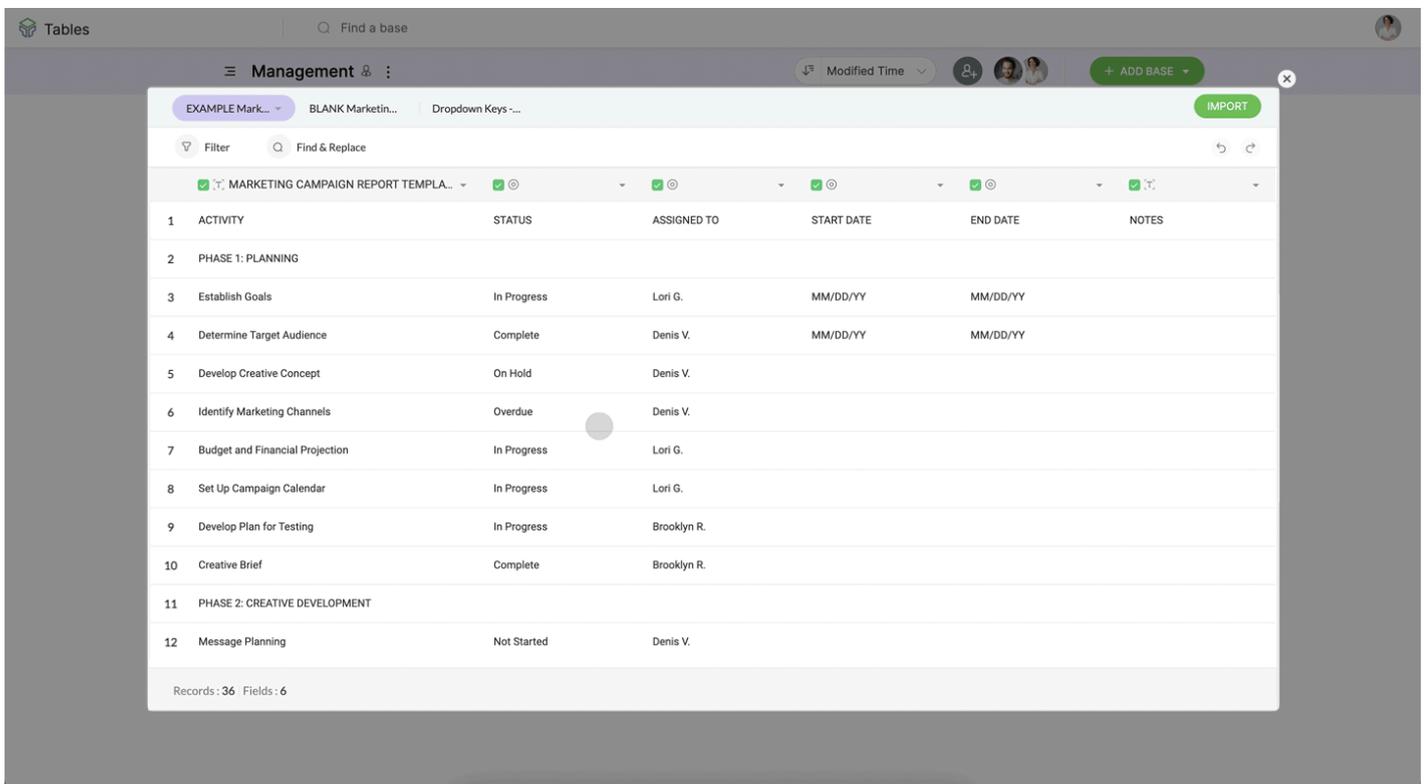




The basics of importing a base

When you choose to import your base, all your data is read and categorized into different fields in your table. But before you complete the importing process, you can customize the base using different configurations.

- 1. Filtering:** You can easily tailor the table to your specific needs and preferences with filters, making it easier to analyze and work with the data. To learn more, head to the [Filter help page](#).



- 2. Find and replace:** Find specific details from your file and replace them with the desired data:
 - a. From the toolbar, click **Find & Replace**. A dialogue box will appear.
 - b. In the **Find** box, type the word you're looking for. Then, in the **Replace with** box, type the word you want it to be replaced with.
 - c. With the **Search in** option, you can either select a particular field where the search is to be conducted or choose **All** to search the whole sheet.
 - d. Choose **Up** or **Down** to customize the direction of your search.

- e. Select the **Match case** option to match the case of the input while searching; and **Match entire cell** will find cells that have the exact content, irrespective of the case.
- f. Choose **Find** to search the data, **Replace** to replace the found data with something else, and **Replace All** to replace all the same data with your desired input.

The screenshot shows the Zoho Tables interface. At the top, there's a search bar for 'Find a base' and a 'Management' menu. Below that, there are tabs for 'EXAMPLE Mark...', 'BLANK Marketin...', and 'Dropdown Keys ...'. A green 'IMPORT' button is visible in the top right corner. The main area displays a table with the following data:

1	ACTIVITY	STATUS	ASSIGNED TO	START DATE	END DATE	NOTES
2	PHASE 1: PLANNING					
3	Establish Goals	In Progress	Lori G.	MM/DD/YY	MM/DD/YY	
4	Determine Target Audience	Complete	Denis V.	MM/DD/YY	MM/DD/YY	
5	Develop Creative Concept	On Hold	Denis V.			
6	Identify Marketing Channels	Overdue	Denis V.			
7	Budget and Financial Projection	In Progress	Lori G.			
8	Set Up Campaign Calendar	In Progress	Lori G.			
9	Develop Plan for Testing	In Progress	Brooklyn R.			
10	Creative Brief	Complete	Brooklyn R.			
11	PHASE 2: CREATIVE DEVELOPMENT					
12	Message Planning	Not Started	Denis V.			

At the bottom of the table, it says 'Records : 36 Fields : 6'.

3. **Customize fields:** Your field types will be automatically identified at import, but you can still change them to another field type:

- a. To change the field type, click the dropdown menu in the field header.
- b. Choose the **Customize Field** option. A dialog box then opens up, where you can rename your field and change the field type.
- c. Based on the field type you select, options for more customization will be listed. For example, if you select **Number** as the field type, you can configure the **Max digits** option.
- d. You also have the option of making the field mandatory by checking the **Mandatory** option. If you don't want this field to get duplicated, select the **No duplicates** option. By default, both these options will be turned off.

The screenshot shows the Zoho Tables interface. At the top, there's a search bar and a 'Management' menu. Below that, there's a table with 12 records. The table has columns for 'ACTIVITY', 'STATUS', 'ASSIGNED TO', 'START DATE', 'END DATE', and 'NOTES'. The 'ASSIGNED TO' column has a dropdown menu open, showing a list of names. The 'IMPORT' button is highlighted in green at the top right of the table.

1	ACTIVITY	STATUS	ASSIGNED TO	START DATE	END DATE	NOTES
2	PHASE 1: PLANNING					
3	Establish Goals	In Progress	Lori G.	MM/DD/YY	MM/DD/YY	
4	Determine Target Audience	Complete	Denis V.	MM/DD/YY	MM/DD/YY	
5	Develop Creative Concept	On Hold	Denis V.			
6	Identify Marketing Channels	Overdue	Denis V.			
7	Budget and Financial Projection	In Progress	Lori G.			
8	Set Up Campaign Calendar	In Progress	Lori G.			
9	Develop Plan for Testing	In Progress	Brooklyn R.			
10	Creative Brief	Complete	Brooklyn R.			
11	PHASE 2: CREATIVE DEVELOPMENT					
12	Message Planning	Not Started	Denis V.			

Records: 36 Fields: 6

4. Select all:

 Note: The checkbox next to the field name denotes the **select all** button. By default, the checkbox is selected, and all the records in the field will be displayed. You can uncheck the option if you'd like to exclude any of the fields from getting imported.

The screenshot shows the Zoho Tables interface. The table is the same as in the previous screenshot. The 'ASSIGNED TO' column dropdown menu is now closed. The 'IMPORT' button is highlighted in green at the top right of the table.

1	ACTIVITY	STATUS	ASSIGNED TO	START DATE	END DATE	NOTES
2	PHASE 1: PLANNING					
3	Establish Goals	In Progress	Lori G.	MM/DD/YY	MM/DD/YY	
4	Determine Target Audience	Complete	Denis V.	MM/DD/YY	MM/DD/YY	
5	Develop Creative Concept	On Hold	Denis V.			
6	Identify Marketing Channels	Overdue	Denis V.			
7	Budget and Financial Projection	In Progress	Lori G.			
8	Set Up Campaign Calendar	In Progress	Lori G.			
9	Develop Plan for Testing	In Progress	Brooklyn R.			
10	Creative Brief	Complete	Brooklyn R.			
11	PHASE 2: CREATIVE DEVELOPMENT					
12	Message Planning	Not Started	Denis V.			

Records: 36 Fields: 6

5. **Sorting:** If you wish to reorganize your fields, you can sort them in ascending or descending order.

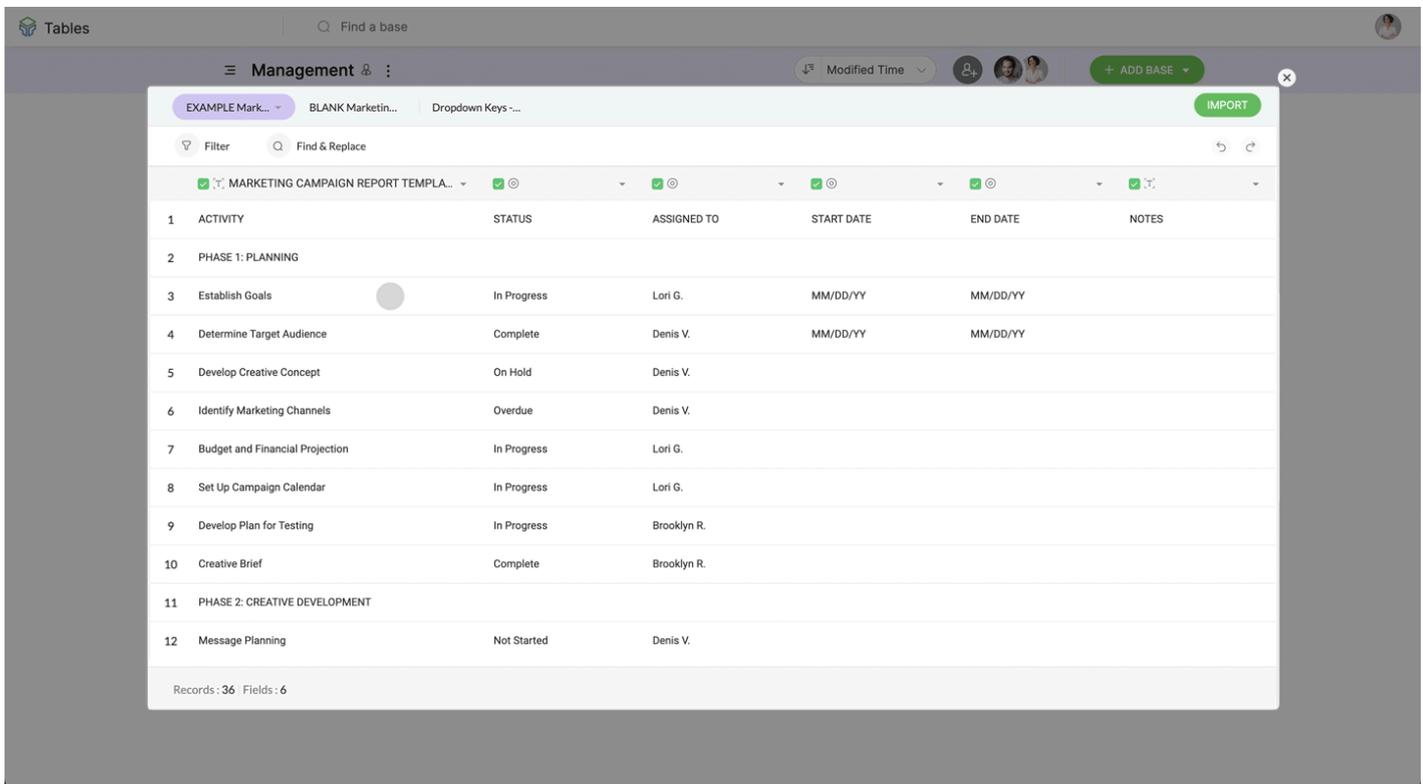
The screenshot shows the Zoho Tables interface. At the top, there's a search bar for 'Find a base' and a 'Management' section. Below that, there are tabs for 'EXAMPLE Mark...', 'BLANK Marketin...', and 'Dropdown Keys ...'. The main area displays a table with 12 rows and 6 columns. The first row is the header row. The table data is as follows:

1	ACTIVITY	STATUS	ASSIGNED TO	START DATE	END DATE	NOTES
2	Budget and Financial Projection	In Progress	Lori G.			
3	Channel A	Complete				
4	Channel B	In Progress				
5	Channel C	In Progress				
6	Channel D	In Progress				
7	CLICK HERE TO CREATE IN SMARTSHEET					
8	Create Marketing Assets	Not Started	Denis V.			
9	Creative Brief	Complete	Brooklyn R.			
10	Determine Target Audience	Complete	Denis V.	MM/DD/YY	MM/DD/YY	
11	Develop Creative Concept	On Hold	Denis V.			
12	Develop Plan for Testing	In Progress	Brooklyn R.			

Records : 36 Fields : 6

6. **Set row as header:** You can easily select a row and choose it to be the header of your table:

- a. Click the **dropdown** icon next to the table name.
- b. From the dropdown menu, you'll see the option "Use the first row as field headers." There's a checkbox next to it, to include or exclude the field header while importing.
- c. If we uncheck the option, the field header names will be removed, and the field type identified by Tables will be displayed.



7. **Include this field:** You can include/exclude any specific table from getting imported:

1. Click the **dropdown** icon next to the table name.
2. From the context menu, you'll see the option to "Include this table." There's a checkbox next to it to include or exclude the table while importing. Excluded tables will appear grayed out.

The screenshot shows a Zoho Tables interface with a table titled "MARKETING CAMPAIGN REPORT TEMPLA...". The table has the following columns: ACTIVITY, STATUS, ASSIGNED TO, START DATE, END DATE, and NOTES. The data is organized into two phases: PHASE 1: PLANNING (rows 3-10) and PHASE 2: CREATIVE DEVELOPMENT (rows 11-12). The status of activities varies, including In Progress, Complete, On Hold, and Not Started. Assigned to individuals include Lori G., Denis V., and Brooklyn R. The interface also shows a search bar, filter options, and an "IMPORT" button.

1	ACTIVITY	STATUS	ASSIGNED TO	START DATE	END DATE	NOTES
2	PHASE 1: PLANNING					
3	Establish Goals	In Progress	Lori G.	MM/DD/YY	MM/DD/YY	
4	Determine Target Audience	Complete	Denis V.	MM/DD/YY	MM/DD/YY	
5	Develop Creative Concept	On Hold	Denis V.			
6	Identify Marketing Channels	Overdue	Denis V.			
7	Budget and Financial Projection	In Progress	Lori G.			
8	Set Up Campaign Calendar	In Progress	Lori G.			
9	Develop Plan for Testing	In Progress	Brooklyn R.			
10	Creative Brief	Complete	Brooklyn R.			
11	PHASE 2: CREATIVE DEVELOPMENT					
12	Message Planning	Not Started	Denis V.			

Records: 36 | Fields: 6

8. **Edit identical cells in a column:** Let's assume you have the same data in multiple cells in a column, and you want to edit them all at once. You can choose the Edit identical cells option to make changes to all of that data at once:

- a. Right-click on one of the identical cells; from the context menu, choose **Edit identical cells in column**. A dialog box will then open.
- b. Type the content that should be updated in the identical cells and click **Apply**.

Management

EXAMPLE Mark... BLANK Marketin... Dropdown Keys ...

Filter Find & Replace

1	ACTIVITY	STATUS	ASSIGNED TO	START DATE	END DATE	NOTES
2	PHASE 1: PLANNING					
3	Establish Goals	In Progress	Lori G.	MM/DD/YY	MM/DD/YY	
4	Determine Target Audience	Complete	Denis V.	MM/DD/YY	MM/DD/YY	
5	Develop Creative Concept	On Hold	Denis V.			
6	Identify Marketing Channels	Overdue	Denis V.			
7	Budget and Financial Projection	In Progress	Lori G.			
8	Set Up Campaign Calendar	In Progress	Lori G.			
9	Develop Plan for Testing	In Progress	Brooklyn R.			
10	Creative Brief	Complete	Brooklyn R.			
11	PHASE 2: CREATIVE DEVELOPMENT					
12	Message Planning	Not Started	Denis V.			

Records: 36 Fields: 6

9. **Remove row:** You can delete any rows that you don't want to be included in your table. Just right-click on the row you wish to delete, and, from the context menu, choose Remove row.

Management

EXAMPLE Mark... BLANK Marketin... Dropdown Keys ...

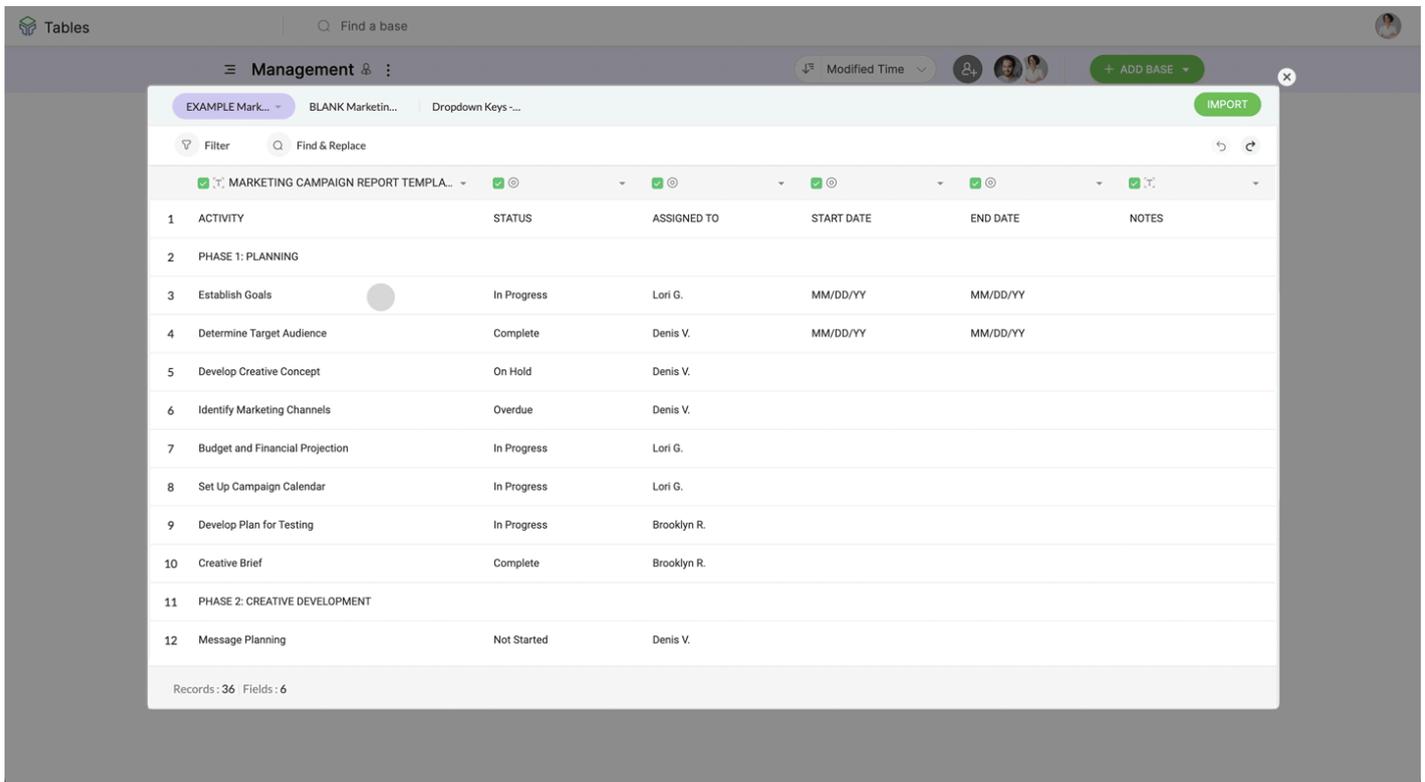
Filter Find & Replace

1	ACTIVITY	STATUS	ASSIGNED TO	START DATE	END DATE	NOTES
2	Budget and Financial Projection	In Progress	Lori G.			
3	Channel A	Complete				
4	Channel B	In Progress				
5	Channel C	In Progress				
6	Channel D	In Progress				
7	CLICK HERE TO CREATE IN SMARTSHEET					
8	Create Marketing Assets	Not Started	Denis V.			
9	Creative Brief	Complete	Brooklyn R.			
10	Determine Target Audience	Complete	Denis V.	MM/DD/YY	MM/DD/YY	
11	Develop Creative Concept	On Hold	Denis V.			
12	Develop Plan for Testing	In Progress	Brooklyn R.			

Records: 36 Fields: 6

10. Record resizing

- a. Hover the mouse over the field header till you can see the **line separator**.
- b. Using the **line separator**, you can drag and drop to adjust the width of the field to view the text.



The screenshot displays the Zoho Tables interface. At the top, there is a search bar labeled 'Find a base' and a 'Management' header. Below the header, there are several tabs and an 'IMPORT' button. The main area shows a table with the following data:

1	ACTIVITY	STATUS	ASSIGNED TO	START DATE	END DATE	NOTES
2	PHASE 1: PLANNING					
3	Establish Goals	In Progress	Lori G.	MM/DD/YY	MM/DD/YY	
4	Determine Target Audience	Complete	Denis V.	MM/DD/YY	MM/DD/YY	
5	Develop Creative Concept	On Hold	Denis V.			
6	Identify Marketing Channels	Overdue	Denis V.			
7	Budget and Financial Projection	In Progress	Lori G.			
8	Set Up Campaign Calendar	In Progress	Lori G.			
9	Develop Plan for Testing	In Progress	Brooklyn R.			
10	Creative Brief	Complete	Brooklyn R.			
11	PHASE 2: CREATIVE DEVELOPMENT					
12	Message Planning	Not Started	Denis V.			

At the bottom of the table, it indicates 'Records: 36' and 'Fields: 6'.