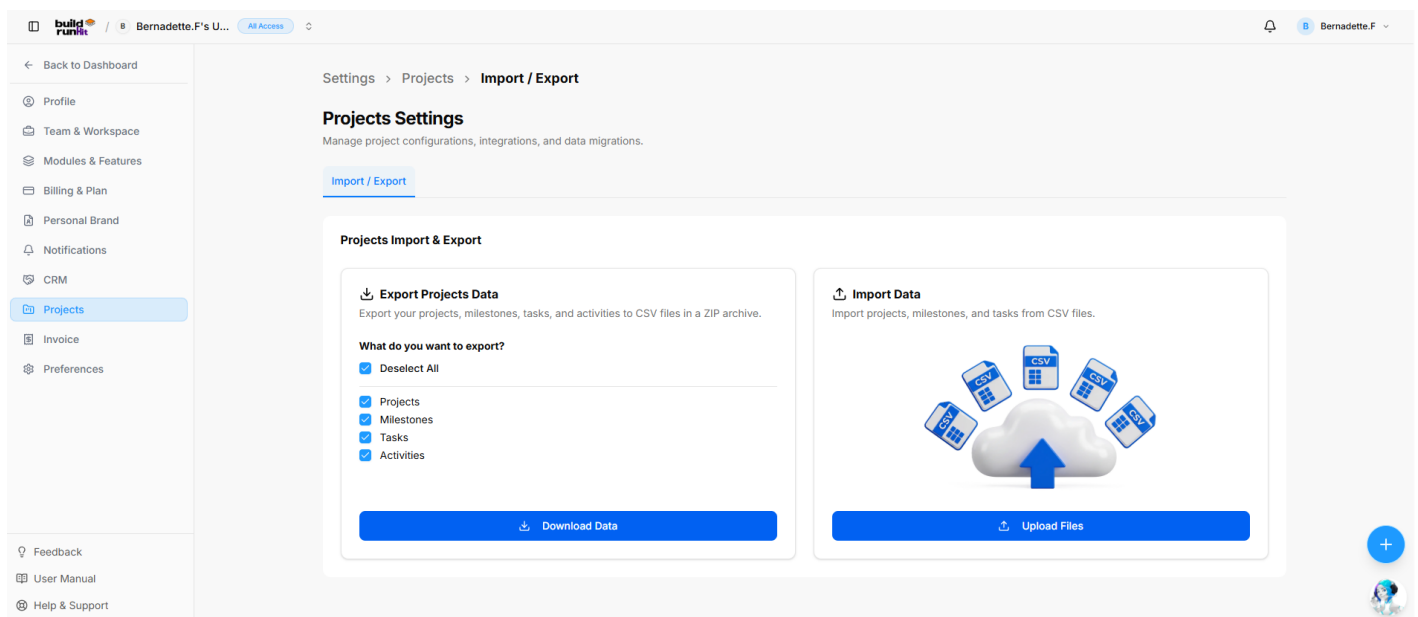


BuildRunKit Projects: Projects Settings

BuildRunKit Projects: Projects Settings - Import / Export Tab



Location & Header

- **Breadcrumb Trail (Traction Navigation Path):** Settings > Projects > Import / Export
- **Page Heading:** Projects Settings
- **Sub-description:** "Manage project configurations, integrations, and data migrations."
- **Active Tab:** Import / Export

Projects Import & Export Dashboard

The dashboard provides side-by-side modules for exporting system backups and importing bulk data:

- **Export Projects Data Panel:**

- **Description:** "Export your projects, milestones, tasks, and activities to CSV files in a ZIP archive."
- **Select All / Deselect All Toggle:** Master checkbox to select or deselect all record categories.
- **Export Categories Checkboxes:** Selectable data sets (*Projects, Milestones, Tasks, Activities*).
- **Download Data Button:** Primary action button to generate and export the compressed ZIP archive.

- **Import Data Panel:**

- **Description:** "Import projects, milestones, and tasks from CSV files."
- **Upload Files Button:** Primary action button to open the import wizard modal.

BuildRunKit Projects: Import Assistant Wizard Modal

SettingsProjectsImport / Export

Import Assistant

Goldilocks Projects Setup

1

PROJECTS

2

MILESTONES

3

TASKS

Step 1: Import your Projects

Start by uploading projects.csv to create the base project records.

Download Templates

Drag & drop your projects file

Max 5MB per file • .csv files only

Upload CSV

Projects Template Columns

Make sure your column headers match the spelling below exactly. Fields marked as **Required** cannot be empty.

title

Project title or name

Type: Text

Example: Website Redesign

REQUIRED

description

Project description and scope

Type: Text

Example: Full redesign and replatforming

OPTIONAL

start_date

Project start date

Type: Date (YYYY-MM-DD)

Example: 2025-01-15

REQUIRED

due_date

Project target completion date

Type: Date (YYYY-MM-DD)

Example: 2025-06-30

REQUIRED

Need help? Check the Import Documentation or contact support.

Modal Setup

- **Trigger Action:** Clicking the blue **Upload Files** button on the Import / Export settings tab opens the multi-step **Import Assistant** overlay.
- **Modal Header:** **Import Assistant** with sub-heading (*Goldilocks Projects Setup*) and an **x** close icon in the top-right corner.
- **Progress Tracker:** Displays numbered 3-step navigation sequence:
 1. **PROJECTS** (Active)
 2. **MILESTONES**
 3. **TASKS**

Step 1: Import your Projects

- **Section Heading:** **Step 1: Import your Projects**
- **Sub-description:** "Start by uploading projects.csv to create the base project records."
- **Download Templates Button:** Action button to download standardized sample `.csv` file structures for mapping.
- **File Drag & Drop Upload Zone:**
 - Interactive upload box (`Drag & drop your projects file`, *Max 5MB per file • .csv files only*).
 - **Upload CSV:** Button to trigger local file directory selection.

Projects Template Columns Reference Panel

- **Panel Warning Header:** "Make sure your column headers match the spelling below exactly. Fields marked as Required cannot be empty."
- **Column Mapping Specifications:**
 - `title` (**REQUIRED**): Project title or name (*Type: Text, Example: Website Redesign*).
 - `description` (**OPTIONAL**): Project description and scope (*Type: Text, Example: Full redesign and replatforming*).
 - `start_date` (**REQUIRED**): Project start date (*Type: Date (YYYY-MM-DD), Example: 2026-01-15*).
 - `due_date` (**REQUIRED**): Project target completion date (*Type: Date (YYYY-MM-DD), Example: 2026-06-30*).

Footer Support Text

- "Need help? Check the Import Documentation or contact support."

Revision #3

Created 2026-05-13 12:31:48 UTC by Bernadette F

Updated 2026-09-11 13:35:20 UTC by Bernadette F