How can I correct date errors in CSV/Excel import files?

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If you are getting date format errors when uploading CSV or Excel files into DocBoss, it is likely caused by Excel's regional settings. Opening a CSV in excel automatically converts any dates using excels expected format. If customers have a required format, and your Excel regional setting is different, Excel will apply its settings when you open the CSV file.

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Option 1 - Change local settings

Option 1 is to change your computer's regional settings based on the project data settings. For detailed information on how to update your computer's regional settings, see our article here. In a default situation (no requirement from customer), you should have your export setting match your excel regional settings so excel doesn't misinterpret the dates.

Option 2 - Change DocBoss settings

Option 2 is to change the date format in your DocBoss Project to match your computer's regional settings. This can be defaulted under project templates as well.

If this is not compatible with your customer's required date format pattern, you can add parameters to variables (date_format) to adjust outputs, while working with your regional settings inside the project.

In the Main screen of your project, change the date format to match the excel setting. Click to save project and reupload your file.

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