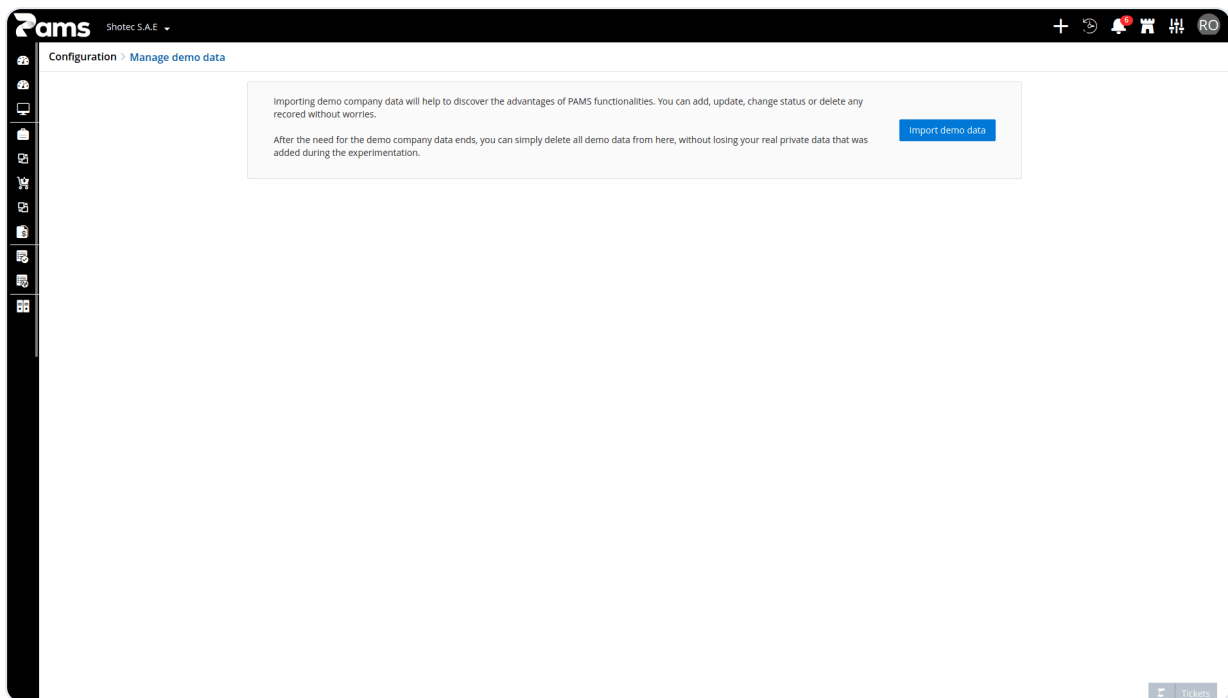


Manage Demo Data

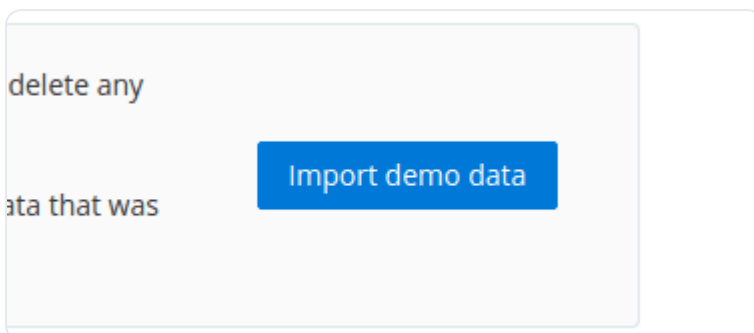
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Manage Demo Data

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Manage Demo Data — Configurations › Manage Demo Data



Overview

Use **Manage Demo Data** to maintain the demo data files available in the system. This page is intended for users who need to add demo data files, retain files that should remain available, remove files that are no longer required, and start the demo data import process.

Open the page from **Configurations > Manage Demo Data**. Review the available files before importing so that you use only the demo data required for the current purpose.

Settings

The available configuration on this page is the **files[]** list. This list represents the demo data files currently attached for management and import.

Before importing, confirm that the required demo data files are present in **files[]**. Use **Attach** when you need to add a file to the list, and use **Delete** only when you have decided that an attached file should no longer be retained.

Note: The page does not display a status or approval lifecycle for demo data. Your main decision is whether to retain, delete, or import the files currently listed.

Workflow

1. Navigate to **Configurations > Manage Demo Data**.

Review the **files[]** list to determine which demo data files are currently available. Use this review to decide whether the existing files are suitable for import or whether the list needs to be updated first.

2. If the required demo data file is not available, select **Attach** and add the file to **files[]**.

Confirm that the file appears in the list before continuing. Attach only the files that you intend to manage or import through this page.

Tip: Keep the attached file list focused on the demo data required for the current activity. A clear list helps prevent importing an unintended file.

3. Decide whether each listed file should be retained or removed.
 - To retain a file, select **Keep**.

- To remove a file that is no longer required, select **Delete**.

Use **Keep** when you want the selected file to remain available. Use **Delete** only after confirming that the file should not remain in the demo data list.

Warning: Review the selected file carefully before using **Delete**. The screen provides no separate displayed status to indicate whether a file has been retained or removed.

4. When the required files are present and you are ready to load demo data, select **Import demo data**.

This starts the demo data import action for the files managed on the page. If the page presents a confirmation, use **Ok** to acknowledge and complete the displayed action.

5. If you need to review ticket-related information available from this page, select **Tickets**.

The **Tickets** action is available from the Manage Demo Data screen. Use it only when ticket information is relevant to the demo data activity you are performing.

6. After completing the required actions, select **Ok** when confirmation is required by the page.

This completes the current on-screen confirmation. Return to the **files[]** list if you need to verify the files before performing another import.

Examples

A project team needs demo data for a sales and purchasing demonstration. The user needs to ensure that only the intended demo data files are available before starting the import.

1. The user opens **Configurations > Manage Demo Data**.
2. The user reviews **files[]** and identifies that the required demonstration file is not yet listed.
3. The user selects **Attach** and adds the required demo data file. The user then verifies that the file is visible in **files[]**.
4. The user finds an older file in the list that is not needed for the demonstration. After confirming that it should no longer remain available, the user selects **Delete** for

that file.

5. The user selects **Keep** for the required demonstration file so that it remains in the managed file list.
6. With the required file available, the user selects **Import demo data**.
7. If the screen requests acknowledgement, the user selects **Ok**. The demo data import action is then completed from the Manage Demo Data page.

Tips

Tip: Review **files[]** before selecting **Import demo data**. This is the available on-screen reference for the files being managed.

Note: Use **Attach** to add required demo data files before starting the import action.

Warning: Do not use **Delete** as a general cleanup action without first confirming that the selected file is no longer required.

Troubleshooting

Symptom	Likely cause	Fix
The required demo data file is not available in files[] .	The file has not been added to the page.	Select Attach , add the required file, and verify that it appears in files[] .
An unnecessary file remains in the demo data list.	The file has been retained rather than removed.	Confirm that the file is no longer required, then select Delete .
You are not ready to import the current set of files.	The files[] list contains files that have not been reviewed.	Review the list, use Keep for files that should remain available, and use Delete for files that should not remain before selecting Import demo data .
A confirmation remains on screen after an action.	The page is awaiting acknowledgement.	Select Ok to confirm the displayed action.

Related pages

- [Configurations — Overview](#)
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- [Configurations — Learning Path](#)
- [Account Managers](#)
- [Custom Fields](#)
- [Dashboard Settings](#)
- [Dynamic Validation](#)
- [Integration With Other CRMs Settings](#)
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