

FOCUS  
ON REAL  
DESIGN  
AUTOMATE  
THE REST

**Update Custom Properties  
with bi-directional Excel Link**

CUSTOMTOOLS

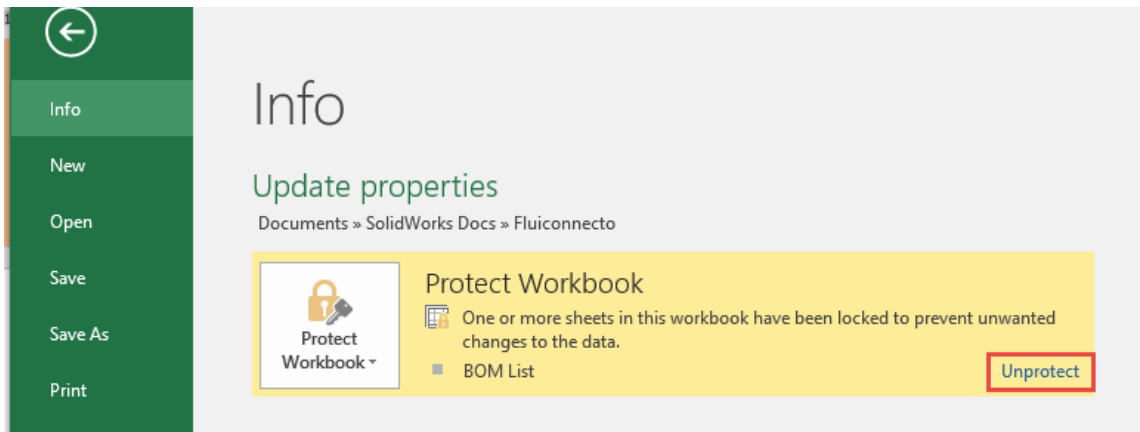
[tero@atrisoft.com](mailto:tero@atrisoft.com) 2.3.2018



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This tutorial applies to CUSTOMTOOLS 2018 SP2 and CUSTOMTOOLS Excel bi-directional link.

1. Configure [bi-directional Excel link](#) based on separate guide
2. Add all custom properties to **Export Profile** fields that you want to modify. You need to enclose all properties that you want to modify in curly braces. For instance, {Name 1}.
3. Open one file in SOLIDWORKS, can be a part to generate one example row in the output Excel file.
4. Generate Excel file by clicking **CUSTOMTOOLS, Export...** and select profile you defined in step 2.
5. After generating output Excel file, you need to unprotect it in order to modify content.



6. There are two hidden columns before Status column holding file and configuration names. You need to widen columns in order to manually add there files whose custom properties you want to update. Note that in the first row you can't have columns without title as then any subsequent columns are omitted.
7. Now you can add all files whose custom properties you want to update to the created Excel file. You can type in values or for instance copy paste from another workbook. When you are read, you may want to save Excel workbook for later use.
8. Create a separate text file for instance by using Notepad. Copy/paste all files to text file and save it to your local computer. This is a list used to tell CUSTOMTOOLS Standalone Import tool which files to update or create in CUSTOMTOOLS database. In case you want to update related drawings, you need to create a separate text file in which you list all related drawing files.
9. All property is not found in specified configuration, the value is written as document property. If you need missing value to be written as configuration specific property, you need to modify macro in Excel file. As macro is protected with password, you need to consult CUSTOMTOOLS team to make the change.



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10. Close SOLIDWORKS and click the **Import** button in the *Update properties.xmlsm*.
11. After writing all property values, CUSTOMTOOLS asks whether to update the drawings.

**Yes:** All files that you saved in the text file are updated or created in CUSTOMTOOLS database and related drawings are opened and saved in SOLIDWORKS to update drawings.

**No:** Drawings are not opened and saved in SOLIDWORKS but files models' custom properties are updated in CUSTOMTOOLS database.

**Cancel:** Drawings are not updated and models' changed custom properties are not updated in CUSTOMTOOLS database.

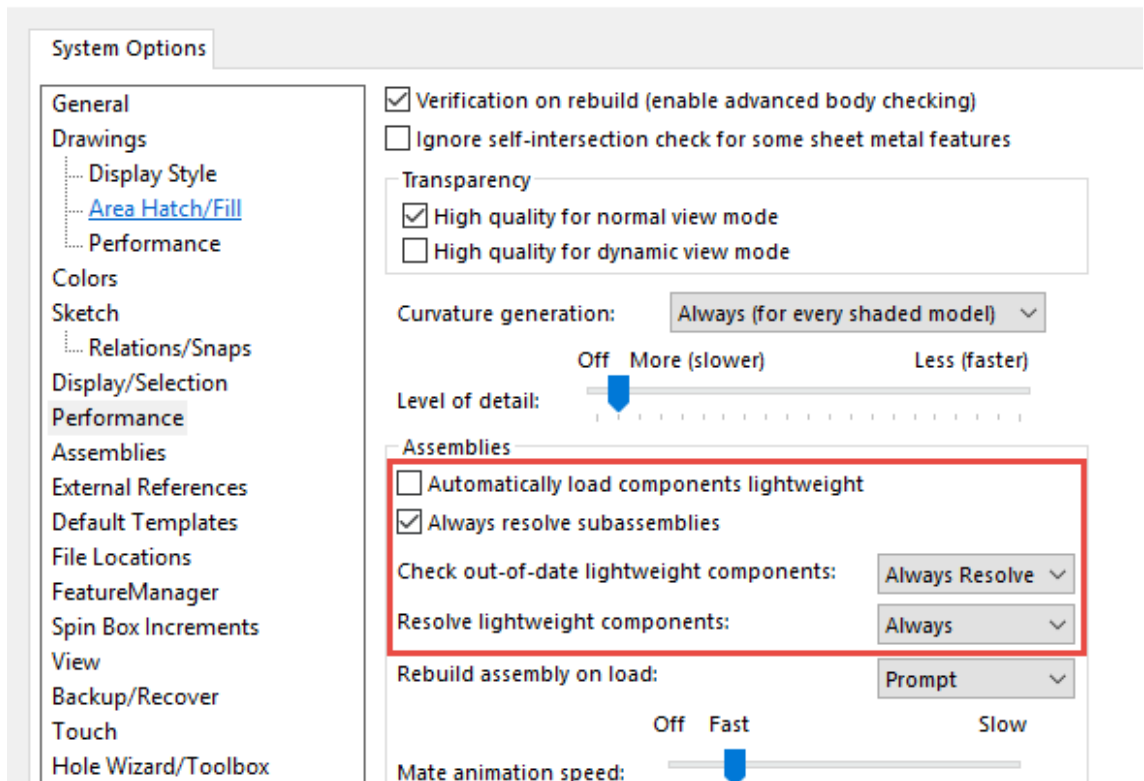
You must choose to cancel the operation as the files are not belonging to one main assembly but must be updated separately based on list that was created in step 8.

12. Run the **Standalone Import Tool** that can be launched from Windows Start menu.
13. If you are using version older than CUSTOMTOOLS 2018 SP2, due to SPR 7117 you need to first click the **Add Files...** button and then **Cancel** the **Open** dialog box after which you can successfully use **Load From File...** functionality.
14. Click the **Load From File...** button to load all SOLIDWORKS model documents that we added to a text file in step 8. The **Files to import** list will be filled with all files from that list. Click to clear the option **Import drawings of 3D models** and click to select the option **Don't import referenced files that already exist in the database**.
15. Select appropriate SOLIDWORKS version to use in the **SOLIDWORKS version to use** list menu.
16. Click the **Import\Convert** button to update files in CUSTOMTOOLS database.
17. After import of SOLIDWORKS model files is complete you are finished if you don't want to update drawing files. In case you want to update drawings, continue with next step.
18. In order to update drawing BOMs, all components need to be loaded. Make sure that in SOLIDWORKS settings you have defined to **Always resolve sub-assemblies** and that **Resolve lightweight components** is set to **Always**. Also clear the option **Automatically load components lightweight**. You can restore original settings are updating drawings.



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### System Options - Performance



19. Run the **Standalone Import Tool** that can be launched from Windows Start menu.
20. Click the **Load From File...** button again. This time you should select the file that contains drawing documents you created in step 8. You need to make sure that the option **Import drawings of 3D models** is not selected and that options **Don't import referenced files that already exist in the database** and **Open and save file in SOLIDWORKS** are selected. Click the **Import\Convert** button to start updating of drawings.
21. After operation completes you have successfully updated custom properties to you SOLIDWORKS files, updated your CUSTOMTOOLS database to reflect changes in properties and optionally updated drawings documents to show updated properties for instance in BOM and title blocks.