



Prepare User Guide

Learn how to use Prepare to shape incoming data to fit your destination schema



What is Prepare?

Prepare allows you to reshape your files—manually or with the help of an AI agent—before importing them to Flatfile. You'll no longer need to use Excel or another tool to restructure incoming files' schema to make them mappable to your system's requirements.

Whether you need to split or combine fields, add or remove columns, or otherwise restructure your file, you can do so without leaving Flatfile.

Note: The Prepare agent is an add-on to the Flatfile Projects product. There may be an additional cost to enable it on your account. Reach out to success@flatfile.com if you're interested in learning more.

This feature is not currently available on the CA regional server.

What Prepare can do

There are two options for making changes to your file structure: 1) manual edits and 2) the Prepare agent. With Source Editor, you can click into any uploaded file and manually make changes prior to import. For more efficient data preparation, Prepare provides a chat interface for prompting the agent. You can make structural file changes including:

Splitting & or combining fields

Adding or removing columns

Formatting columns

Creating conditional fields (e.g., "if 'Country' is 'USA,' set 'Country Code' to '1'")

Creating fields with calculations (e.g., "set 'Total Deductions' to the sum of all the 'Deductions'")

Unpivoting data (from wide to long data)

Note: Prepare is intended to help you reshape your source file with field-level changes, and to help to populate fields required in the destination schema from existing ones. It isn't designed for validating or normalizing the values in the sheets themselves—this will happen post-mapping.

Once you've made your changes, you'll proceed with importing and mapping your newly prepared data to your destination schema.



Common use cases by industry

Prepare is useful for all kinds of data import needs across industries. For example:

Systems integrators

Prepare helps systems integrators restructure client data exports so they're compatible with destination platforms during implementations and migrations.

- ERP and CRM migrations: Source files from legacy systems often contain verbose labels, nested fields, or inconsistent formats. Prepare makes it easy to split, combine, or flatten these for schema alignment.
- Third-party API exports: When integrating multiple vendor systems, data dumps often include redundant or mismatched columns. Use Prepare to deduplicate, rename, or reformat columns to fit the target schema.
- Client onboarding templates: Reshape client-provided spreadsheets so they meet the import requirements of the systems you're standing up—without needing custom scripts.

SaaS Companies

Prepare helps SaaS teams clean and restructure customer-uploaded files to reduce friction during onboarding and drive faster time-to-value.

- Customer data uploads: Split or combine columns like names, addresses, or metadata tags to match required schemas during customer onboarding workflows.
- Usage and activity logs: Unpivot wide exports into row-level event records for downstream reporting or ingestion into product analytics tools.
- Legacy data migrations: When importing customer historical data, Prepare enables structural changes to match your current system's data model—without involving engineering.

Ecommerce Marketplaces

Prepare allows ecommerce operations and support teams to reshape merchant, catalog, and transaction data so it can be easily imported into core systems.

- Product catalog imports: Combine or split fields like product name, size, and color; or unpivot variant columns into standardized rows for ingestion into product databases.
- Merchant onboarding: Restructure spreadsheets containing merchant profiles, banking details, and contact info to meet platform schema requirements.
- Order and transaction history: Flatten multi-column transaction logs into consistent row-level records for fulfillment systems or reporting pipelines.

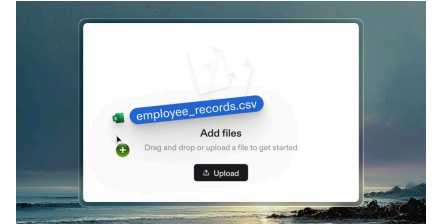


How to use Prepare

Once you're logged in to your Flatfile account:

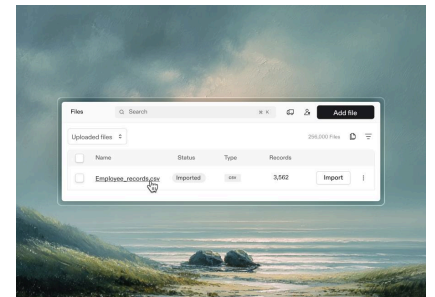
1. Upload your file

- Go to the Files section within your Flatfile project.
- Use the drag and drop feature to add your file or click Upload file.



2. Open the file

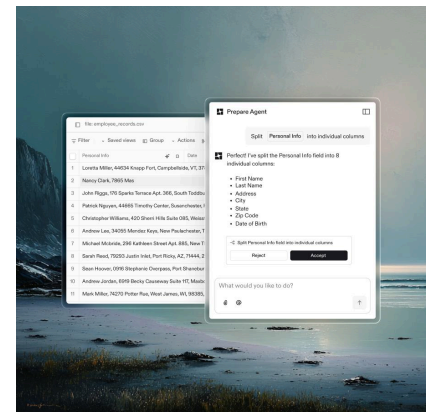
- Once your file is uploaded, find it in your Files list and click the file name to open it.
- This opens the Source Editor view, where you'll find the option to use the Prepare chat assistant or make manual edits.



3. Choose how you want to edit your data

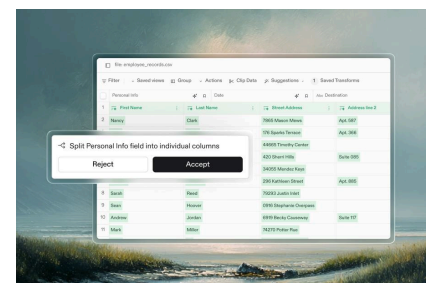
In Prepare, you can reshape your file two ways:

- **Use the Prepare agent:** Click “Assistant” in your toolbar to open the chat interface. Type in a natural language command like “Split full name into first and last name fields.” The assistant will present a preview of the action and apply the changes once you click to approve.
- **Make manual edits in the Source Editor:** Click the three dots next to a column header to see the menu for making column changes. You'll be able to add, remove, clear, or rename a column from here. You're also able to manually edit individual values—just keep in mind that you'll have more resources for normalizing and transforming values post-mapping.



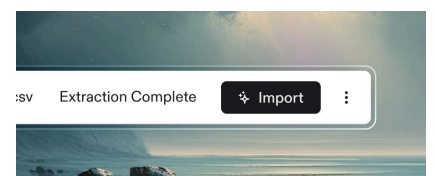
4. Review your changes

- As you make manual edits or approve the agent's previews, you'll see your data update in real time.
- Changes that were made by the agent will appear in green column headers, indicating they're saved.
- Make sure your columns and values now match the structure your destination schema expects. This is the best time to fix any mismatches in your source file so that mapping is simple later.



5. Click Import to move forward

- Once your file is structured how you'd like it to be, click Import in the top right corner of your dashboard. This will take you to the mapping interface, where mapping will be much more efficient now that your source and destination schema are aligned.





How to use Prepare

The Prepare agent can be prompted in natural language via the chat interface. As with any LLM, there are best practices to follow to get the best results from the agent:

1. Be specific about what you need done	General comments like “this column is wrong” may not get the desired outcomes. Instead, call out the exact issue you’re seeing in the preview.
	<div><div>✓ Good prompt: “The ‘Full Name’ column should be split into first and last names.”</div><div>✗ Weak prompt: “This column should be split.”</div></div>
2. Focus on structural issues, not values	Prepare is intended to reshape your file structure—not modify specific entries. You’ll be able to normalize and transform values (like converting “yes/no” to “true/false”) after your data has been imported and mapped.
	<div><div>✓ Good prompt: “Combine the ‘City’ and ‘State’ columns using a comma.”</div><div>✗ Weak prompt: “Fix the capitalization in the State column.”</div></div>
3. Describe column relationships clearly	When you need to reference values from one field in another or otherwise rely on data relationships, clearly outline exactly what you want in your prompt.
	<div><div>✓ Good prompt: “Use ‘Work Phone’ to populate ‘Phone Number’ when present; otherwise, use ‘Home Phone.’”</div><div>✗ Weak prompt: “Unpivot the phone columns into a single ‘Phone Type’ column.”</div></div>

Example Prompts

- “Can you split the ‘Name’ column into two columns: one for first name and one for last name?”
- “Combine the ‘Unit Type’ and ‘Unit Number’ columns and insert the result into the ‘Street 2’ column.”
- “Rename the ‘DOB’ column as ‘Date of Birth.’”
- “Create a new ‘Shipping Method’ column and set to ‘Express’ if ‘Order Value’ is over \$100; otherwise, set to ‘Standard.’”
- “Unpivot the columns ‘Quarter 1,’ ‘Quarter 2,’ ‘Quarter 3,’ and ‘Quarter 4’ into a single ‘Quarter’ column with corresponding values.”



Limitations

When working with Prepare, remember that:

- It does not work on files other than CSV and XLSX files at the moment.
- It doesn't support the application of complex Excel-style formulas.
- It doesn't perform data validation (that happens later).
- It doesn't currently support pivoting data (from long to wide).
- Currently, it does not automatically detect and apply changes based on your destination schema.

Security and data protection

Data protection

All data is encrypted in transit and at rest, with isolated databases for each tenant or data upload to ensure strong logical segregation. We host our infrastructure on Amazon Web Services (AWS), using multiple availability zones for redundancy and uptime. Routine backups are fully encrypted and regularly tested to confirm restoration reliability.

AI access

Flatfile's AI operates entirely within its own infrastructure and does not send customer-uploaded data to third-party AI vendors. We do not use customer data for training external models, and our AI systems do not retain raw customer data for generalized model learning.

Access control

Each guest sees only the data they're allowed to access, based on assigned permissions. Admins can manage user access settings and view a complete audit log of every change made.

Data history

Flatfile automatically keeps a version history of your data, so you can see how it has changed over time. Admins can restore previous versions using saved snapshots, and all edits are recorded in the audit log for full traceability.



FAQs

What happens if my data is already formatted how I want it—will Prepare change it?

Prepare does not make any changes to your files automatically. It only changes your data if you manually edit it or if you ask the Prepare assistant to perform a particular action.

Will Prepare affect the original uploaded file?

No—Prepare edits a working version of the data, not your source file.

Can I undo changes made in Prepare?

Yes, all changes made manually or with the help of the Prepare agent can be rolled back at any time. Flatfile keeps a version history to enable you to move quickly without worrying about mistakes.

Will Prepare automatically match my columns to the destination schema?

Prepare does not automatically map your fields, but it does make them much easier to map in the next step of your Flatfile workflow. You'll no longer need to split or combine fields or do other schema adjustments during mapping.

Can I use formulas like in Excel inside Prepare?

No—Prepare does not support Excel-style formulas or functions. You can use the assistant to perform complex structural changes, but not via formulas like `=VLOOKUP()` or `=PROPER()`.

Do changes I make in Prepare carry over when I import the file?

Yes—any changes you approve will carry over into the import and mapping steps.

What if I need additional help?

You can find more resources for using Transform in our Knowledge Base. If you're still stuck or have questions, reach out to our team at support@flatfile.com.