Fast·Class File

Client Data System

Volume 62: Contact Dump and Load

Whenever possible, E-Z Data recommends storing all contact data in one database. However, should it become necessary to store contact data in more than one database, the newly enhanced Contact Dump and Load feature in CDS version 4.3 makes it easy to dump contacts out of one database and load them into another.

With CDS v4.3, it is now possible to dump and load multiple contact records at the same time. The enhanced Dump and Load feature also ensures that all contact information including insurance policies, investment positions, and SmartPad records are included when contact records are dumped from one database and loaded into another.

To Dump Contact Records from a Database –

- Open a **Contact** summary screen with the contacts that will be dumped from the database.
- Tag the records to be dumped or use the **Tag All** button in the toolbar to tag all records in the summary screen.
- Select **Record** in the main menu bar then select **Dump Contact** in the **Record** menu.
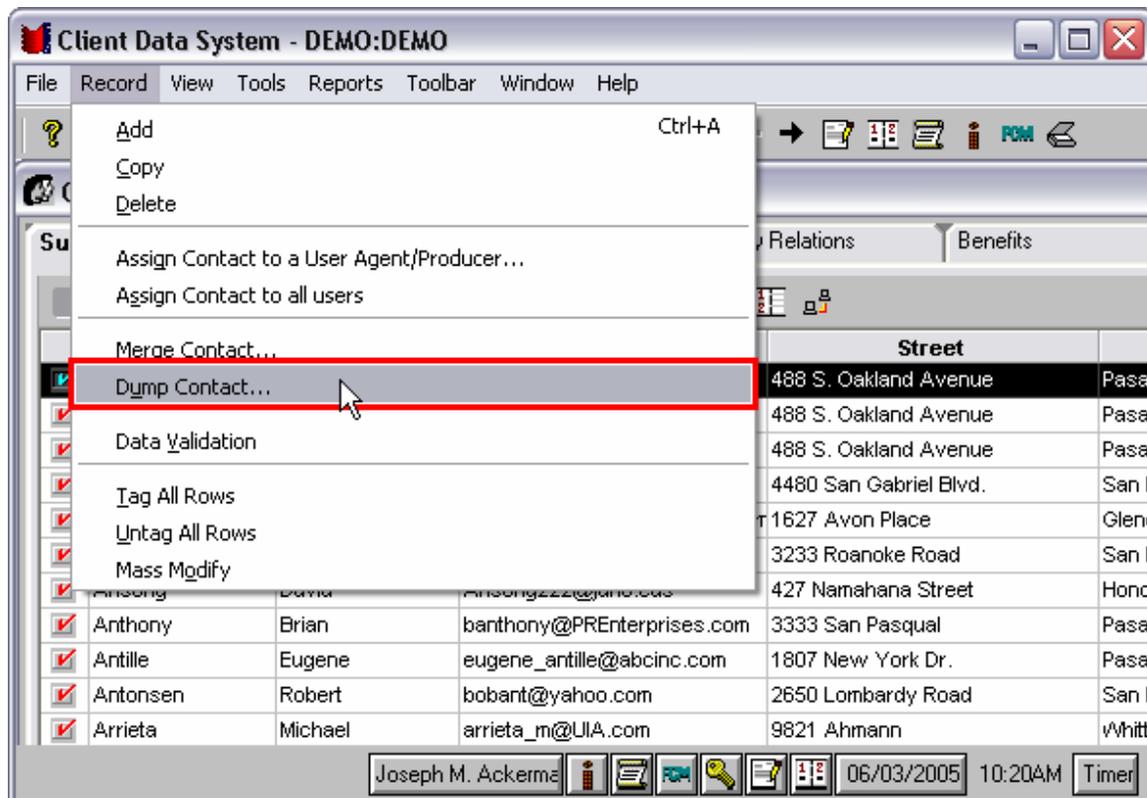

Figure 1: The Dump Contact Option in the Record menu of the Contact summary screen.

- Use the **Select destination directory** window to select a location to save the ezDump.xml file that will contain the data from the dumped contacts and click **OK**.

Figure 2: The Select destination directory window.

- CDS will begin the process of dumping the selected contact records into the .xml file.

Note: The dump process may take a few moments. The amount of time it takes for CDS to dump records will depend on the speed of your system, the number of records selected, and the amount of data associated with each record.

- When the process is complete, CDS will open a **Contact Dump Utility window** displaying the location of the **ezDump.xml** file and the type and amount of data included in the dump.
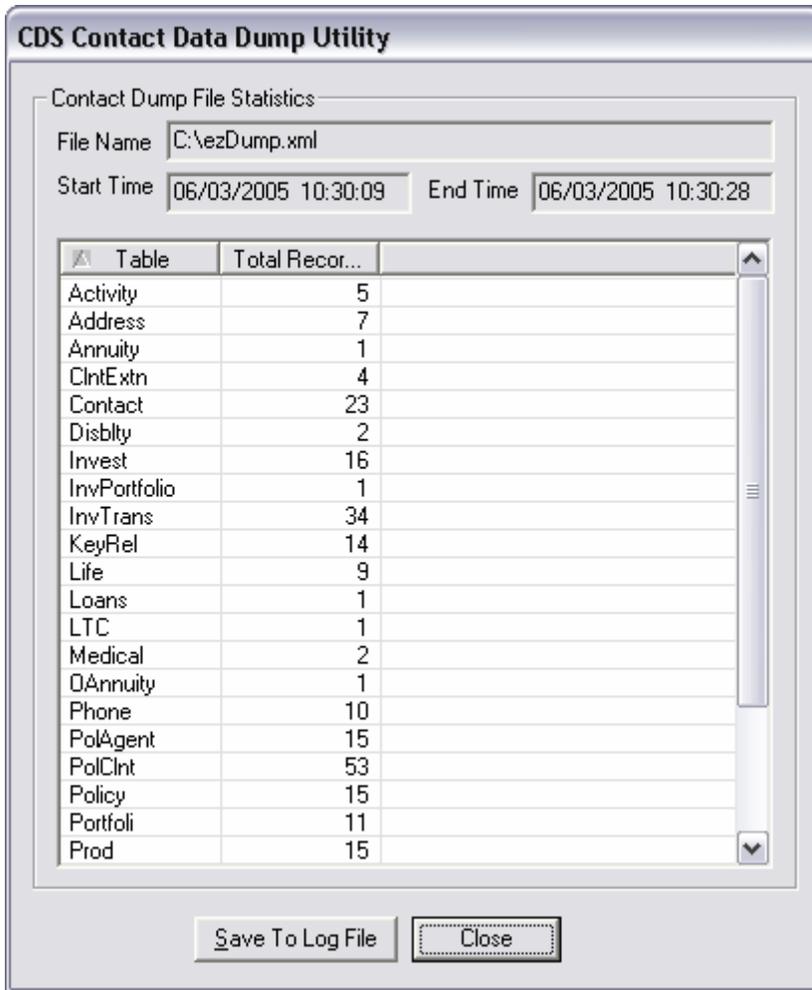
CDS Contact Data Dump Utility

Contact Dump File Statistics

File Name C:\ezDump.xml

Start Time 06/03/2005 10:30:09   End Time 06/03/2005 10:30:28

Table	Total Recor...
Activity	5
Address	7
Annuity	1
ClntExtn	4
Contact	23
Disblty	2
Invest	16
InvPortfolio	1
InvTrans	34
KeyRel	14
Life	9
Loans	1
LTC	1
Medical	2
OAnnuity	1
Phone	10
PolAgent	15
PolClnt	53
Policy	15
Portfoli	11
Prod	15

Save To Log File   Close

Figure 3: The CDS Contact Data Dump Utility window displaying dump data.

You can save a copy of the information in the **Contact Dump Utility window** by clicking the **Save to Log File** button.

Important: *Using the Dump and Load feature to dump records into an .xml file will not delete records from a database. To delete records, use the **Delete** button in the toolbar.*

To Load Contact Records into a Database from an .xml File –

- Log in to the database that the contact records will be loaded into.
- Select **Database** in the main menu bar.
- In the **Database** menu, select Utilities.
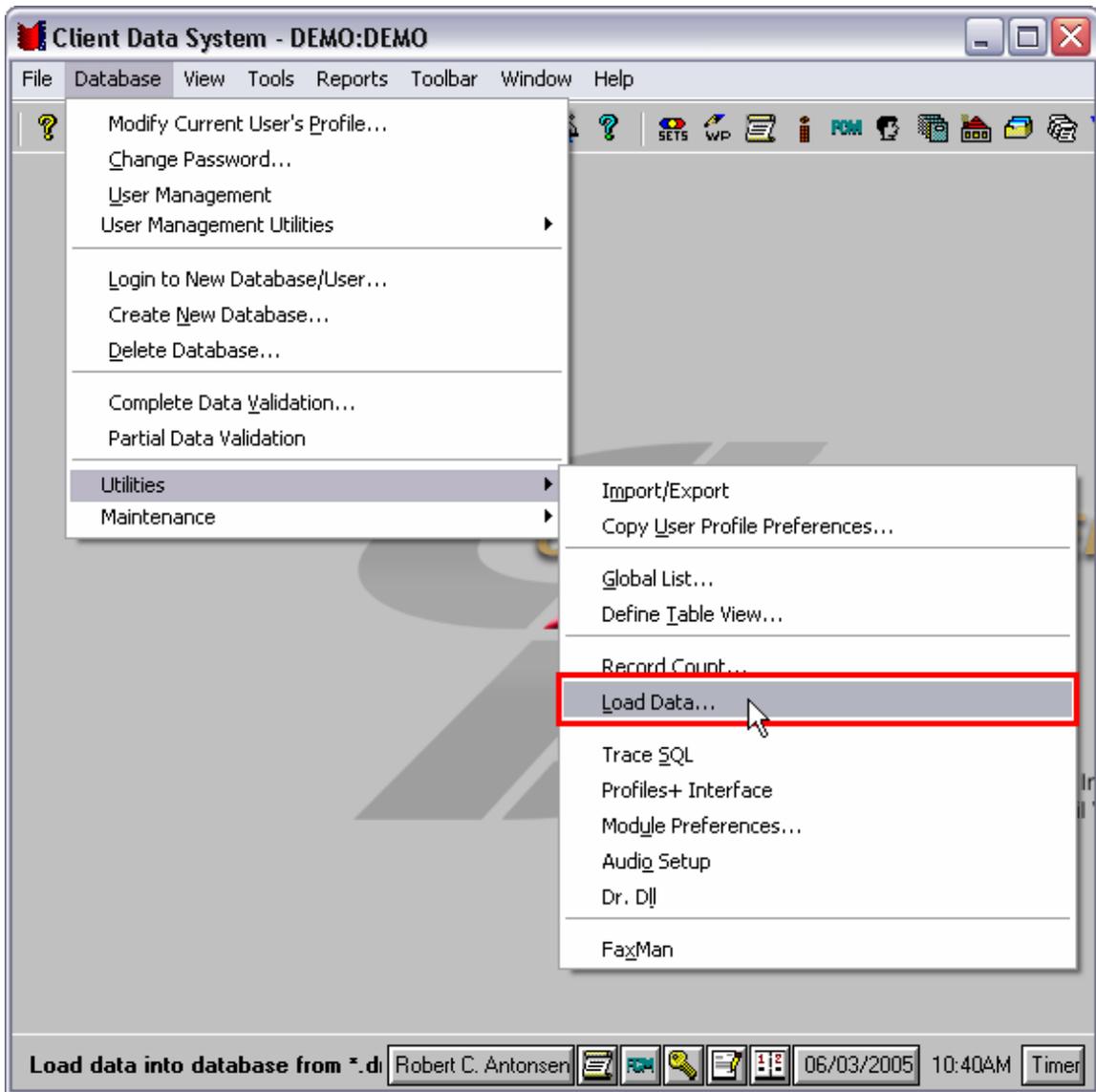- In the **Utilities** menu, select **Load Data**.

Figure 4: The Load Data option in the Utilities menu.

- In the **Select Data Load Options** window, select the **Contact Data Files (*.xml)** option and click **OK**.
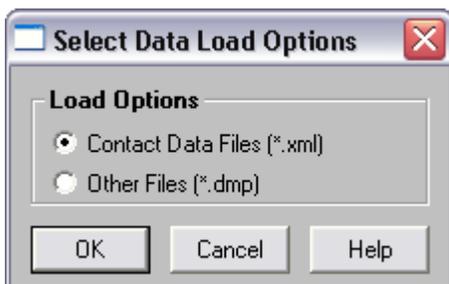

Figure 5: The Select Load Data Options window.

- Use the **Load File** window to locate the **ezDump.xml** file then select the **ezDump.xml** file and click **Open**.
- CDS will begin the process of loading data into the database from the .xml file.

Note: The load process may take a few moments. The amount of time it takes for CDS to load records will depend on the speed of your system, the number of records selected, and the amount of data associated with each record.

- When the load process is complete, CDS will open a **CDS Contact Data Load Utility** window displaying the type and amount of data loaded into the database.
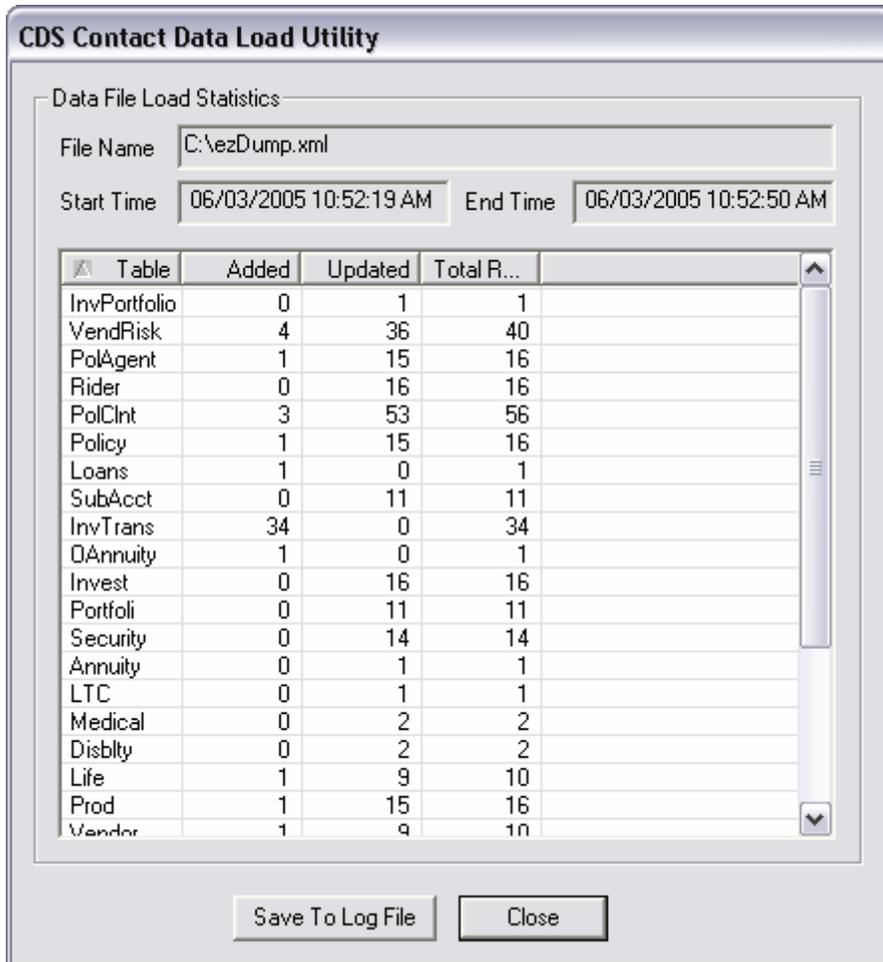
CDS Contact Data Load Utility

Data File Load Statistics

File Name: C:\ezDump.xml

Start Time: 06/03/2005 10:52:19 AM   End Time: 06/03/2005 10:52:50 AM

Table	Added	Updated	Total R...
InvPortfolio	0	1	1
VendRisk	4	36	40
PolAgent	1	15	16
Rider	0	16	16
PolClnt	3	53	56
Policy	1	15	16
Loans	1	0	1
SubAcct	0	11	11
InvTrans	34	0	34
OAnnuity	1	0	1
Invest	0	16	16
Portfoli	0	11	11
Security	0	14	14
Annuity	0	1	1
LTC	0	1	1
Medical	0	2	2
Disblty	0	2	2
Life	1	9	10
Prod	1	15	16
Vendor	1	9	10

Save To Log File | Close

Figure 6: The CDS Contact Data Dump Utility window displaying load data.

You can save a copy of the information in the **Contact Dump Utility window** by clicking the **Save to Log File** button.

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