

Client Data System

Volume 91: Data Import

The **Import/Export Definition tool** can be used for a number of different files as long as the organization of the columns in the files matches the columns in the **Import/Export Definition window**.

When importing contact data, E-Z Data recommends using a **.csv (comma-separated value) file**. **.CSV** is a flexible file format which CDS is able to interpret and can be opened in Microsoft Excel.

To import contact data into CDS:

• With the .csv file properly formatted, select **Database** from the main menu.

	Microsoft Excel - Import.csv										
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1	Last Name	First Name	Gender	Marital	Street	City	State	Zip	Description	DOB	
2	Roberts	Randy	Male	Married	568 Harris	Alhambra	CA	91536	Residence	8/16/1965	
3	Humphries	Kay	Female	Married	229 Oaktre	Pasadena	CA	91106	Business	6/22/1974	=
4	Bingman	Harold	Male	Single	8596 Jeffer	Sierra Mac	CA	91056	Residence	9/1/1960	
5	Vasquez	Paul	Male	Married	85 23rd Av	Glendale	CA	91682	Business	10/7/1978	
6	O'Reily	Kate	Female	Single	745 Avenu	Studio City	CA	91065	Residence	6/27/1980	
7	Chang	Martha	Female	Married	462 Reyna	Pasadena	CA	91106	Residence	4/16/1969	
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Figure 1: Contact data in .csv format

- Select Utilities from the Database menu.
- Select Import/Export from the Utilities menu.
- From the Import/Export definition screen, click the Add Record button.
- Select the file to be imported and click **Open**.
- From the Selection Type window, select the file type for the import.
- Click OK.
- From the Table Names window, select **Contact Information**.

Note: Careful not to select Contract Information.

- Click OK.
- A warning message opens.

Client Data System				
(į)	When importing/exporting phone numbers or addresses from the Contact Information table, use Phone1-4 or Address1 and Address2, toward the end of the Columns Available list. Data will not be imported properly using any other phone or address columns.			
	ОК			

Figure 2: Warning message

Note: The message window warns that when you're importing or exporting telephone and address information, you need to use specific fields in the import or export definition.

- Click **OK**.
- From the Import/Export Definition Contact window, select which columns you need to import from the **Columns Available section**.

Columns Available		Columns Selected	Separator
Suffix Middle Greeting Title Type Sub Type Source Sub Source Occupation Job Title	~	1 Last Name 2 First Name	Delimiter Date Format
Birth Date Age Gender Tobacco Marital #Child		Col Order Order All	MMDDYYYY

Figure 3: The Import/Export Definition Contact window

- Click the **right arrow button** to move columns into the **Columns Selected section**.
- When finished selecting your columns, click **OK**.
- From the Import/Export definition summary screen, tag the import.
- Click the Import button to open the Contact/Business Import Options window.

Contact/Business Import Options					
Assign Contacts To Odell, Daniel Paladian, Mark Peterson, Norma Ridder, Nancy Russom, Mike Singer, Edward Warnings, Eileen	Create Calendar Activity Starting From / / Group Size Every (Days) Skip Saturday Skip Sunday To Do Add Contacts to Set Set Name				
Automatic Value Assignment Record Type Contact Type Auto increment Source Auto increment					
Record Matching Options O Don't use record matching Algorithm O Use Record Matching - Automatically Use Record Matching - Show matching list					
OK Cancel Help					

Figure 4: The Contact/Business Import Options window.

• From the **Assign Contacts To section**, assign contacts to one agent or more. *Note: If no agents are selected, the imported contacts will be assigned to all agents.*

- From the **Create Calendar Activity section**, create activities for the new contacts if necessary.
- From the Add Contacts to a Set section, assign your imported contacts to a set.

Note: When importing data, E-Z Data recommends you add contacts to a set, especially with large imports. This is so you can quickly reference your new contacts after the import.

- Click the drop-down from the Add Contacts to a Set section and select **Import**.
- From the Automatic Value Assignment section, select the Record Type.
- Enter a **Type** and **Source**. (i.e., Type: Contact; Source: Import)
- From the **Record Matching Options section**, select whether or not you would like CDS to check for duplicates.

Note: The third option, 'Use Record Matching – Show matching list', displays a list of contacts CDS suspects to be duplicates <u>during</u> the import. CDS will give you the option to add the possible duplicate as a contact record.

- When finished entering your import options, click **OK**.
- From the Import File Name window, browse for the file to import.
- Click Open.
- A Contact list shows the sample of the data to be imported.

Note: If you spot bad data in the list, you must go back and redefine your import/export definition.

- Click **OK** to begin the import.
- Once the import finishes, click **OK**.

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