

# Fast•Class File

SmartOffice

Data Import

## Access to the Data Import Wizard

Before importing data into SmartOffice, you must have access to the Data Import Wizard. If you have the right to access the Data Import Wizard, you will see the **Data Import Wizard** option in the **Data Maintenance** menu.



Figure 1: The Data Import Wizard option in the Data Maintenance menu.

If the **Data Import Wizard** option is not available, contact your SmartOffice administrator.

## Formatting the Data File

Before performing a data import, the data to be imported must be formatted correctly. Data to be imported into SmartOffice must be saved in Comma Separate Value (.csv) format. Additionally, data in a .csv file must also be broken down such that the data in each cell corresponds to a field type in SmartOffice. For example, contact name information in SmartOffice is broken down into first, last, and middle name fields. When contact data is imported into SmartOffice from a .csv file, contact information must be broken down in the same fashion: one column for contact first name, another column for contact last name and so on. If data is not properly formatted, then data will be imported incorrectly in SmartOffice, thus creating data integrity issues.

	A
1	Full Name
2	Ackerman, Joseph M.
3	Ackerman, Kathleen M.
4	Adams, Frank
5	Adams, Margaret

Figure 2: Improperly formatted data (full contact name in one column).

	A	B	C
1	Last Name	First Name	Middle
2	Ackerman	Joseph	M
3	Ackerman	Kathleen	M
4	Adams	Frank	
5	Adams	Margaret	

Figure 3: Properly formatted data (contact name separated into columns that will map to fields in SmartOffice).



Depending on the type of data that will be imported, you may need to ensure that data in specific fields is also formatted properly. The following types of data must be formatted correctly before an import:

Dates

Any dates such as Dates of Birth, must be in the mm/dd/yyyy format.

Telephone numbers

Phone numbers must include one correctly placed hyphen (“-“), e.g. (626) 585-3515.

The following are examples of correctly formatted phone numbers:

- 310 972-0086
- (626)-790-3807
- 808-330-3486x321

Zip Codes

Either the five or nine digit zip code format is acceptable. However, the nine-digit format must have the hyphen (“-“) separating the two sets of numbers, e.g. 90069-2005.

	A	B	C	D	E	F	G	H
1	LastName	FirstName	DOB	Address1	City	State	Zip	Phone
2	Zamamoto	Tsuyako	2/10/1955	2170 Abajo Drive	Monterey Park	CA	91754-5678	(626) 280-7634
3	Zampanski	Nadia	2/3/1966	7221 W. 6th Street	Los Angeles	CA	90048-9069	310 972-0086
4	Zantonsen	Robert	2/25/1933	2650 Lombardy Road	San Marino	CA	91108	(626)-7999021
5	Zashtouni	William	2/14/1955	1586 Alisal Avenue	San Jose	CA	95125	(408)-265 1537
6	Zeresman	Michael	2/1/1943	4723 Sanford Drive	Culver City	CA	90230	(310) 555-1234 ext.000
7	Ziverson	Francis	1/1/1934	3338 Teranimar Drive	Anaheim	CA	92804	(714)-824-6790 ext. 999
8	Zollister	Bertha	1/5/1950	309 Vista #3	Pasadena	CA	91107	(626)-790-3807 x888
9	Zolson	James	2/16/1983	770 Barnum Way	Monterey Park	CA	91754	(626) 589-0115 #1169
10	Zolton	Peter	1/2/1925	344 Monterey Road, #206	South Pasadena	CA	91030	(626)-233-1238123
11	Zosterman	Karen	2/10/1952	220 Punene Street	Hilo	HI	96720	(808)-330-3489#321
12	Zung	Harold	2/7/1928	4131 Bernice Avenue	Los Angeles	CA	90031	(323)-551-3232x777

Figure 4: Sample of correctly formatted spreadsheet contact data in Microsoft® Excel®.

**To Format a File for Data Import –**

- Enter the data in a spreadsheet in an application that supports .csv file format such as Microsoft® Excel®.
- Ensure that the data is separated into columns that correspond directly to fields in SmartOffice, e.g. one column for last name data, one column for first name data and so on.
- Insert a row at the top of the spreadsheet. This will be a row of column header labels (see examples in figures 3 and 4).
- In the new row, enter header information describing the data in each column, e.g. Last Name, First Name, DOB, and so on. This row will be used to map data in the spreadsheet to fields in SmartOffice.

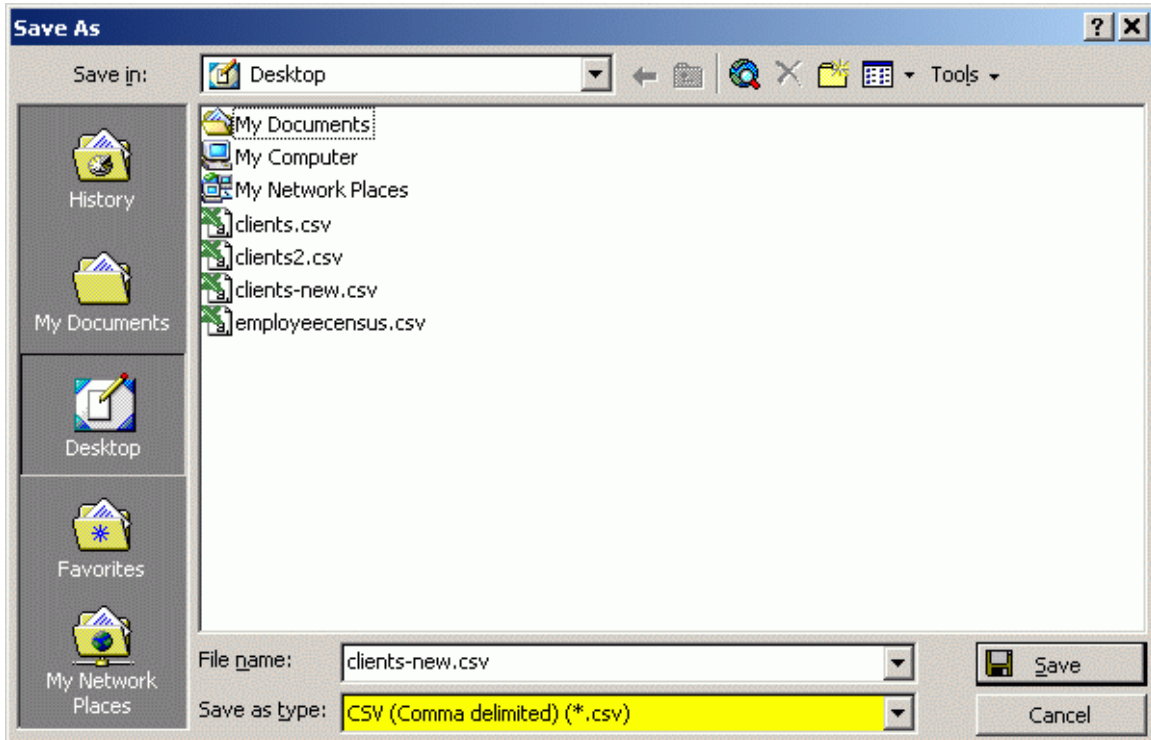
If you are using Microsoft® Excel® to format the data, use the **Format Cells** tool to format **Date**, **Telephone Number**, and **Zip Code** data.

- Right-click once on the column letter of the column with the data to be formatted.
- In the context menu, left-click on **Format Cells**
- Select the appropriate category (such as **Date** for DOB or **Special for Phones and Zip Codes**)
- Select the correct format (such as **mm/dd/yyyy** or **Zip Code + 4** or **Phone Number**)
- Click **Ok** when finished.
- When finished, save the spreadsheet in .csv format.



**To save a file in .csv format using Microsoft® Excel® -**

- Select **File** in the menu bar.
- Select **Save As...**
- Select a location to save the file in the **Save in** field of the **Save As** window.
- In the **Save as type** drop-down field of the **Save As** window, select CSV (Comma delimited) (\*.csv)



**Figure 5: The CSV option selected in the Save as type drop-down field of the Save As window.**

- Enter a filename with the **.csv** extension at the end of the filename.
- Click **Save**.

## Creating the Import Setup

After formatting the data for import, the Import Setup Wizard will help you create a map for the data in the .csv file to specific fields in SmartOffice.

### To Map the Data in a .csv File to Fields in SmartOffice –

- Select **Data Maintenance** in the main menu then select **Data Import Wizard**.
- In the **Import Setup List** screen click the **Add** button.

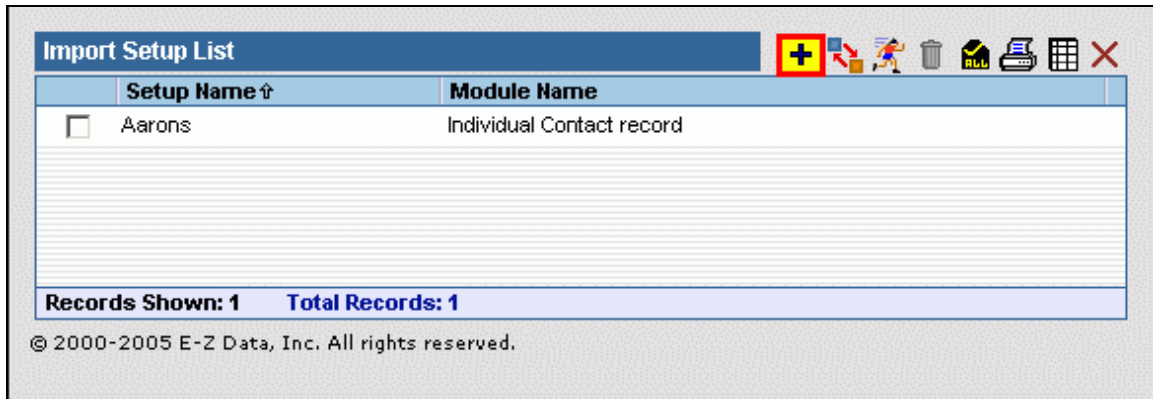


Figure 6: The Import Setup List screen (Add button highlighted)

- Select the type of contact records to be imported and click **Next**.

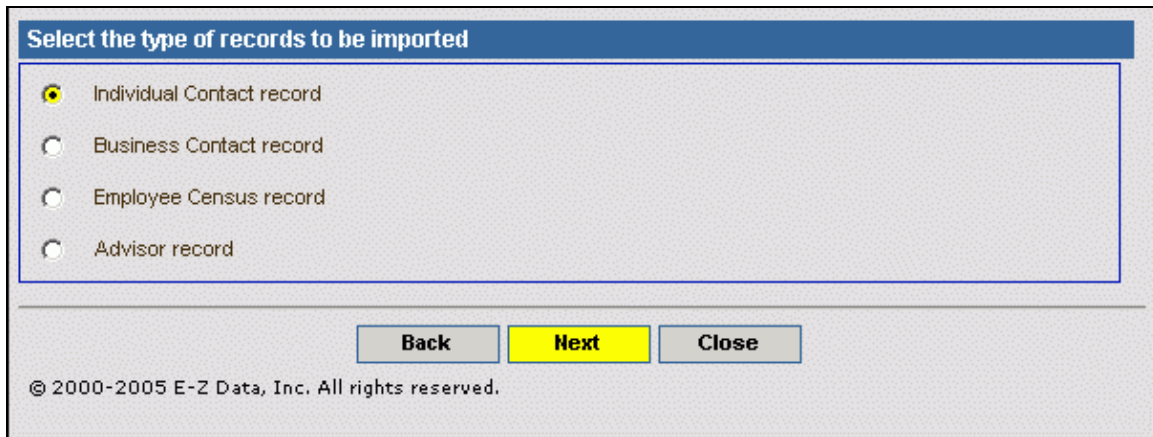


Figure 7: The Select the Type of records to be imported screen.

- Click the **Browse** button in the **Files to be used for Mapping** screen to locate the .csv file with the data to be imported.

**File to be used for Mapping**

Select the file and data format. Depending on the file size and connection speed, this process may take several minutes to upload.

Select File  **Browse...**

Data Format **Comma Separated Text File**

Column Headings Present

**Automatic Value Assignment**

Type

Source

Record Matching

Should a Business Record be created for the Employer if one does not already exist?

**Back** **Next** **Close**

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Figure 8: The Files to be used for Mapping screen.

- Use the **Choose file** window to locate the .csv file with the data that will be imported. Once you have located the file, select it with a left-click and click the **Open** button.

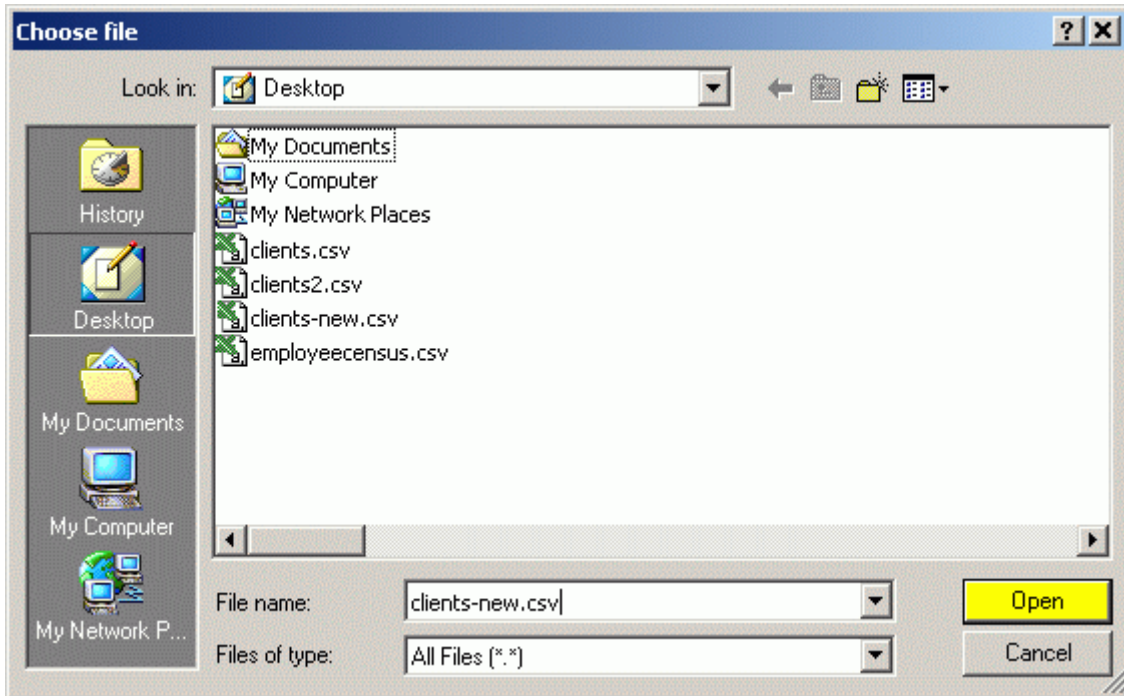


Figure 9: The Choose file window.

- The name of the file will be entered in the **Select File** field of the **File to be used for Mapping** screen.

- Select the **Column Headings Present** option in the **File to be used for Mapping** screen. This will prevent the column headings added to the .csv file from being imported into SmartOffice.

Once you have selected which file to be used for mapping, check the **Column Headings Present**.

Figure 10: The Column Headings Present option.

The **Automatic Value Assignment** section gives you the option to identify the **Type** and **Source** of each contact included in the import. Use the drop-down in each field to select a **Type** or **Source** option. You may also create a custom choice for the drop-down if needed by clicking on the **C** button in the appropriate field. Defining Type and Source information is not required for an import; however, it can save time when importing a group of contacts of the same type.

*Note: The ability to create custom choices is based on security settings for your user ID. If you need to create custom choices in either drop-down and do not have access to the **C** button, speak to your SmartOffice administrator.*

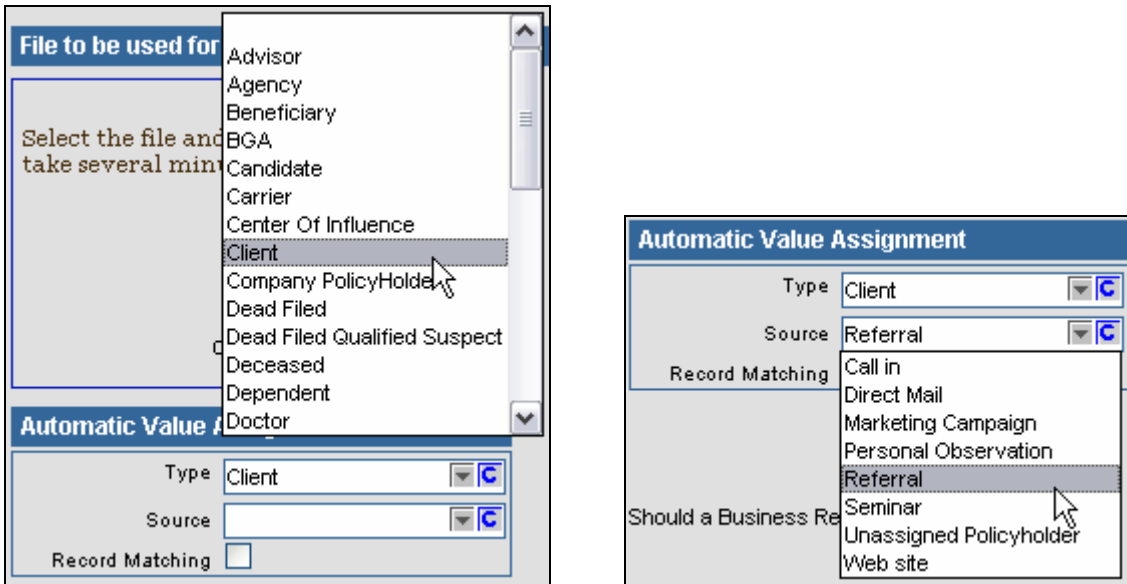
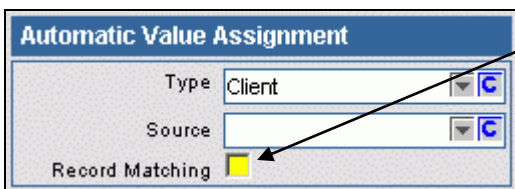


Figure 11: The Type and Source drop-down fields in the Automatic Value Assignment section.

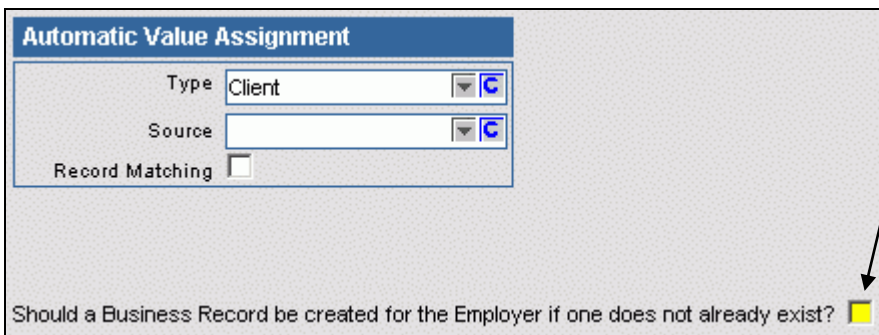
- Select **Type** and **Source** data as needed (not required).
- Select the **Record Matching** option if needed.



The **Record Matching** option, when checked, will check records that you are importing to see if they match against existing records in SmartOffice. This will help prevent duplicate records from being formed.

Figure 12: The Record Matching option.

- Select the **Should a Business Record be created for the Employer, if one does not already exist** option if needed.



Select this option if the .CSV file to be imported has a column for **Employers**. This will add additional Business Records and link them to the Imported Contacts. If there is no **Employers** column in the .CSV file do not select this option.

Figure 12: The Create Business Record option.

- Click **Next**.



- In the **Column Mapping Definition** screen, map the columns in the selected .CSV file to the appropriate fields in SmartOffice.

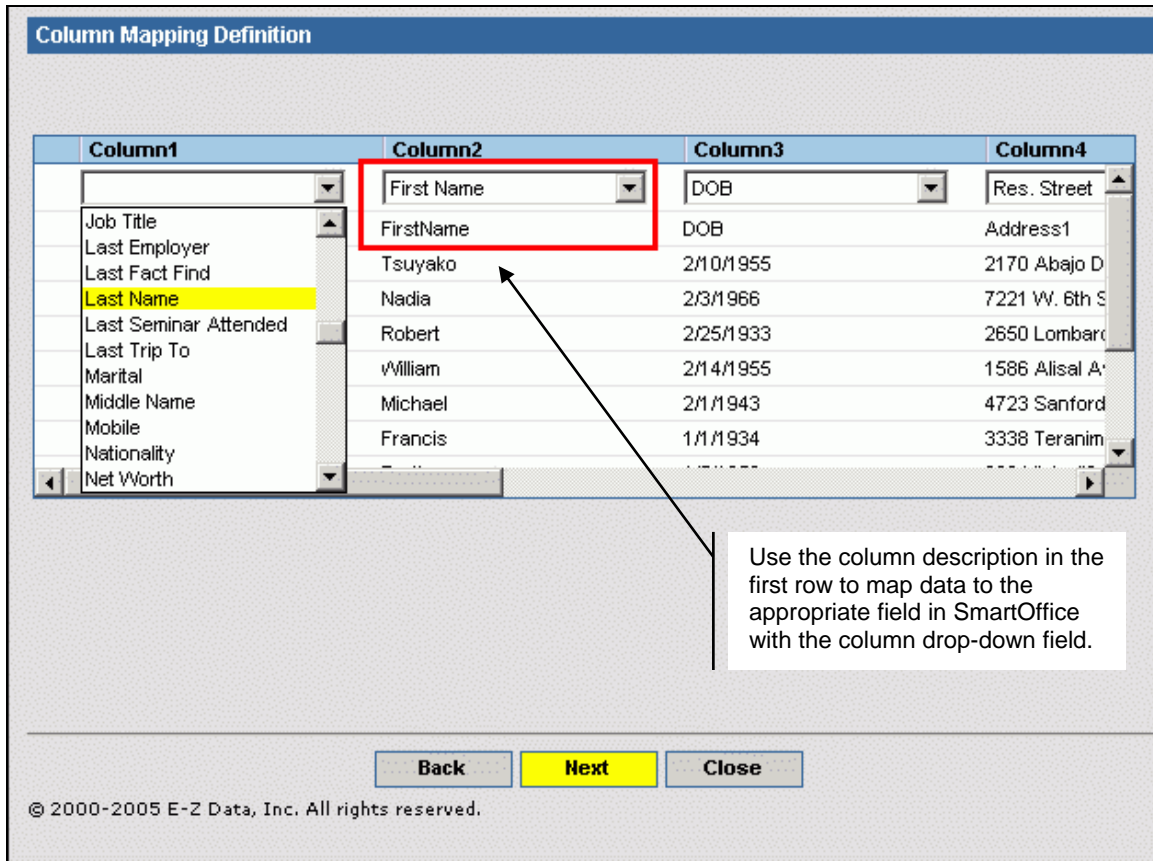


Figure 13: Column Mapping Definition screen.

- The data in the first row will be the column headers added to the .CSV describing the data in each column. Use this row as a reference as you create the map. Beginning with the first column, click on the drop-down at the head of each column and find the SmartOffice field that matches the column in the .CSV. Repeat this process for each column in the .CSV.
- When mapping is complete, click **Next**.
- Select a phone and/or date format if necessary.

**Figure 14: The Data Format Selection screen.**

The **Data Format Selection** screen allows you to select what country phone format you want as well as the format of the date. Currently, the **Phone Format** field only allows for US/Canadian phone formats. The **Date Format** drop-down does have multiple options, but remember that the selected data format must match the date format used in the .CSV file

- After selecting phone and date data format, click on **Next**.
- Give the import definition a name in the **Enter Setup Name** field.

**Figure 15: The Import Setup screen.**

- Click **Finish**.
- The new setup will appear in the **Import Setup List**.

**Important Note:** At this point, no data has been imported. Only the setup defining the data map has been created. This setup can now be used to import the data from the .CSV file to SmartOffice. Also, as this definition has been saved, it can be used for future imports provided the format of the .CSV file matches the format of the file used to create the map.

## Importing Data

After the import definition has been saved, you will return to the Import Setup List screen and begin the process of importing your data. The new definition will be on display in the setup list.

- Click the checkbox next to the selected definition
- Click the **Run** button in the **Import Setup List** toolbar.

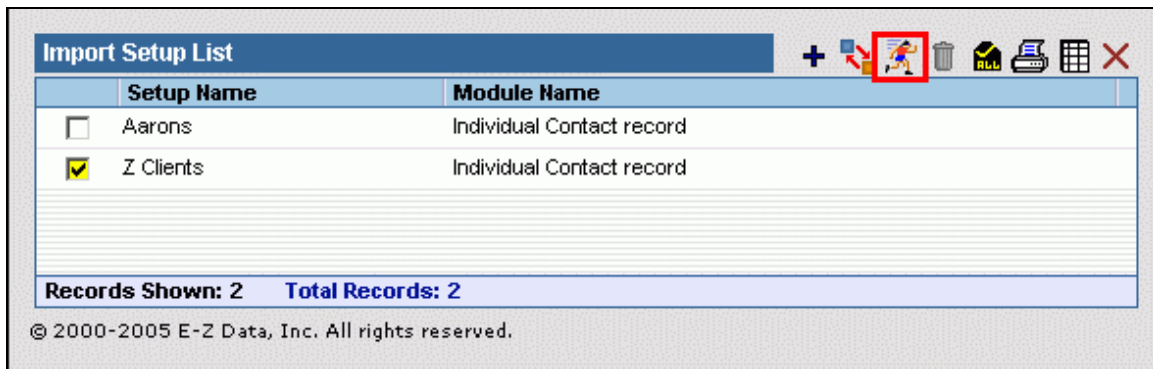


Figure 16: The Import Setup List screen (new definition selected)

- Review the message regarding user assignments.

The statement in the **User Assignments** screen is basically stating that if your SmartOffice security is turned on, all imported records will be assigned to the user performing the import. Review the security settings by selecting **Office Setup** in the main menu then select **Office Settings**. User assignment can be changed after the import using the **Mass Assignment** utility, which is an additional right granted by the SmartOffice administrator. However, if SmartOffice security is not turned on, this statement to does not apply.

- Click **Next** to continue with the import.

- Click the **Browse** button in the **File to be used for Import** screen to select the .CSV file with the data that will be imported into SmartOffice.

**File to be used for Import**

Select the file and data format. Depending on the file size and connection speed, this process may take several minutes to upload.

Select File  **Browse...**

Data Format

**Back** **Finish** **Close**

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**Figure 17: The File to be used for Import screen.**

- After selecting the .CSV file, click **Finish**.
- The data in the .CSV file will be imported into SmartOffice.

	Last Name ↑	First Name	DOB	Type	All Addresses	All Phones
<input type="checkbox"/>	Zamamoto	Tsuyako	02/10/1955	Client	Residence 2170 Abajo Drive Monterey Park, CA 91754-5678	Residence (626) 280-7634
<input type="checkbox"/>	Zampanski	Nadia	02/03/1966	Client	Residence 7221 W. 6th Street Los Angeles, CA 90048-9069	Residence (310) 972-0086
<input type="checkbox"/>	Zantonsen	Robert	02/25/1933	Client	Residence 2650 Lombardy Road San Marino, CA 91108	Residence (626) 799-9021
<input type="checkbox"/>	Zaschtouni	William	02/14/1955	Client	Residence 1586 Alisal Avenue San Jose, CA 95125	Residence (408) 265-1537
<input type="checkbox"/>	Zeresman	Michael	02/01/1943	Client	Residence 4723 Sanford Drive Culver City, CA 90230	Residence (310) 555-1234#000
<input type="checkbox"/>	Ziverson	Francis	01/01/1934	Client	Residence 3338 Teranimar Drive Anaheim, CA 92804	Residence (714) 824-6790#999
<input type="checkbox"/>	Zollister	Bertha	01/05/1950	Client	Residence 309 Vista #3 Pasadena, CA 91107	Residence (626) 790-3807#888
<input type="checkbox"/>	Zolson	James	02/16/1983	Client	Residence 770 Barnum Way Monterey Park, CA 91754	Residence (626) 589-0115#1169
<input type="checkbox"/>	Zolton	Peter	01/02/1925	Client	Residence 344 Monterey Road, #206 South Pasadena, CA 91030	Residence (626) 233-1238#123
<input type="checkbox"/>	Zosterman	Karen	02/10/1952	Client	Residence 220 Punene Street Hilo, HI 96720	Residence (808) 330-3489#321
<input type="checkbox"/>	Zung	Harold	02/07/1928	Client	Residence 4131 Bernice Avenue Los Angeles, CA 90031	Residence (323) 551-3232#777

Figure 18: The final product.

Doing a search for last names that begin with Z (per the example in the Fast Class) shows that all the names imported correctly. The zip codes in the **All Addresses** column are set up correctly as are the phone numbers in the **All Phones** column.

As noted earlier, it is vital to verify the integrity of spreadsheet data before importing data into SmartOffice. While one or two mistakes may be of little consequence, consider the potential data integrity problems of poorly formatted data if thousands of records are imported. The time required to fix the data within SmartOffice after importing poorly formatted data is considerable.