# Fast-Class File

Client Data System

### Volume 30: Importing Group Census Data

Before data can be entered into the **Group Census** tab of a business record, it must be organized in a file format that can be interpreted by CDS. One file type that CDS can read is Comma Separated Value or .CSV. Microsoft Excel can be used to format data and save it in .CSV file format.

Once the data has been organized and saved in .CSV format, you can create an import definition to bring the data into the group census of a business record in CDS.

To import data directly into the Group Census tab of a business record -

- From the main screen of CDS, click on the **Business** button and perform a search for the selected business.
- With the selected business record in focus, click on the Group Census tab.
- With the Group Census tab selected, click on the Tools menu and then select Import Census Names.



Figure 1: The Tools menu of the Group Census tab with the Import Census Names tool selected.

Note: It is important to use the **Import Census Names** tool to import contacts to the Group Census tab of a business record for two reasons:

- 1. The **Import Census Names** tool creates a link between imported contacts and the selected business.
- 2. There are unique group census columns that are only available for import when using the **Import Census Names** tool.

After selecting Import Census Names from the Tools menu -

• Click the Add button in the Import/Export Definitions window.

Import/Export Definitions (1)						
↓ ↓ ▼ ズ ズ Ⅲ 🗎						
Description						
Outlook98 - Sample Import						

Figure 2: The Import/Export Definitions window.

• Select the **Comma Separated Value** option in the **Import/Export Selection** Type window.

Import/Export Selection Type					
- Options					
O Ascii					
O Dba:	se				
Com	ma Separated	Value			
OK	Cancel	Help			

Figure 3: The Import/Export Selections Type window.

In the Import/Export Definition window, move columns out of the Columns Available section into the Columns Selected section in accordance with the order of columns in the .CSV file.

2	Α	В	C	D	E	F	G	Н	1
1	Last Name	First Name	Gender	Marital	Compensatio	Hire Date	Pre-ex	DOB	Age
2	Roberts	Randy	Male	Married	45,000	10/1/1997	Diabetic	8/16/1965	38
3	Humphries	Kay	Female	Married	60,500	4/23/1986		6/22/1974	29
4	Bingman	Harold	Male	Single	75,000	3/15/1999		9/1/1960	43
5	Vasquez	Paul	Male	Married	55,000	1/24/1998		10/7/1978	25
6	O'Reily	Kate	Female	Single	40,000	3/27/2003		6/27/1980	22
7	Chang	Martha	Female	Married	43,000	7/12/2001		4/16/1969	34



## Figure 4: .CSV file column organization and corresponding import map in the Import/Export Definition – Contact window.

Moving columns into the **Columns Selected** section creates a map for CDS to follow when importing data. The number preceding a column entry indicates which column in the .CSV file CDS will pull data from for the selected column. For example, the first entry in the **Columns Selected** section, **1 – Last Name**, indicates that data in the first column of the .CSV file will be entered in the **Last Name** column of the Group Census contact record. Note that in this example, the entries in the **Columns Selected** section match the organization of columns in the .CSV file.

- When column mapping is completed, click **OK**.
- Give the import definition a name in the Name field and click OK.
- Select the newly created import definition in the **Import/Export Definitions** window and click the **Import** button.



Figure 5: The Import button in the Import/Export Definitions window.

• Select import options in the Contact/Business Import Options window.

New contacts can be	Contact/Business Import Options	И	Create follow-up activities for
assigned to agents in the Assign Contacts To section.	Odell, Daniel     Starting From     / /       Paladian, Mark     Group Size       Peterson, Norma     Every (Days)       Russom, Mike     Skip Saturday		imported contacts using the <b>Create</b> <b>Calendar</b> <b>Activity</b> section.
The Record	Warnings, Eileen 🔽 Skip Sunday		
Type value is preset for imported Group Census contacts. Type and Source values only	Add Contacts to Set Set Name  Automatic Value Assignment  Record Type Group Census Type Auto increment		Imported contacts can be added to a set using the Add Contacts to Set section.
apply to full contact records and will not appear on the Group Census contact detail screen.	Source       Auto increment         Record Matching Options       On't use record matching Algorithm         Use Record Matching - Automatically       /         Use Record Matching - Show matching list       /         OK       Cancel       Help		Check for duplicate contacts during an import by selecting one <b>Record</b> <b>Matching</b> <b>Option</b> .

Figure 6: The Contact/Business Import Options window.

• After selecting import options, click **OK**.

Import File Name			? X
Look in: 🕞 Local Disk (C:	)	+ 🗈 💣 🎫	
Autorun Documents and Settings Download EPOAgent loader Loop	MobilinkLog My WebEx Documents Program Files QUARANTINE Reports Restore	C Temp WINNT WUTemp Croup Census	s.csv
Image: File name: Group Censul       Files of type: T.csv	S.CSV	Canc	2

#### Figure 7: The Import File Name window.

- Find the file with data to be imported in the **Import File Name** window and click **Open**.
- CDS will display a thumbnail preview of the import.

Last Name	Marital	mpensatic	Hire Date	re.Ex.Conc	Birth Da
LastName	Marital	Compensatio	Hire Date	Pre-ex	DOB
Roberts	Married	45,000	10/1/1997	Diabetic	8/16/196
Bingman	Single	75,000	3/15/1999		9/1/1960
Vasquez	Married	55,000	1/24/1998		10/7/1978
O'Reily	Single	40,000	3/27/2003		6/27/198(
Chang	Married	43,000	7/12/2001		4/16/1969

Figure 8: Preview of the newly created group census import.

• Verify that the import definition has been mapped correctly. If the mapping needs to be redone, click the **Cancel** button and set up the import definition correctly. If the mapping is correct, click **OK** to perform the import.

Contacts added to the **Group Census** tab of a business will appear in blue in the **Group Census** summary spreadsheet.

Group census contacts (listed in blue) are different from full contact records (listed in black). Group census contact records do not normally display in the contact record summary screen, sets, or dynamic reports unless the option has been turned in on the **Contact Record** tab of the User Preferences.

To promote a group census only contact record to a full contact record -

- Select the group census contact record by tagging the record.
- Business ABC Manufacturing [Group Census] (14) \_ 🗆 × Summary Detail Key Relations **Group Census Business Custom Fields** | ≫ ≜↓ ⅔↓ 🖨 🗇 🖽 🎔 🎞 📗 🕈 🍆 🗑 🎋 😭 1 Class Birth Date Compensation Pre.Ex.Cond . Contact M. Hire Date Christiansen, Carolina Class 2 - Managers 04/10/1943 95,000 02/13/1995 Fredricks, Lawrence Class 3 - All Others 08/01/1931 64,000 11/07/1996 Diabetic Class 2 - Managers 02/10/1955 95,500 05/26/1993 🔲 Hamamoto, Tsuyako Horley, Elan Class 3 - All Others 11/10/1979 34,000 05/14/1993 Antille, Eugene Class 3 - All Others 03/07/1956 54,000 09/18/1994 Nearsightedness Johnson, Fred Class 1 - Owners, Exe 800,000 06/06/1991 04/05/1967 46,000 11/24/1997 Sheng, Do Class 3 - All Others 05/16/1952 Fish, Richard Class 3 - All Others 12,000 12/06/1992 12/08/1963 Class 1 - Owners, Exe 02/02/1972 750,000 06/06/1991 🔲 Garcia, Regina Bingman, Harold 75,000 03/15/1999 09/01/1960 Vasquez, Paul 10/07/1978 55,000 01/24/1998 O'Reily, Kate 06/27/1980 40,000 03/27/2003 Chang, Martha 04/16/1969 43.000 07/12/2001 🔲 Roberts, Randy 08/16/1965 45,000 10/01/1997 Diabetic
- Click the **Convert to Contact** Button.

### Figure 9: The Convert to Contact button on the Group Census tab toolbar.

To view or modify the detail screen of a group census contact record -

- Double click on the selected contact record on the Group Census tab.
- Make changes as needed in the Group Census contact detail screen.

Group Census						
-Personal Informa	tion	Spouse Information				
Contact	Bingman, Harold	Last/First				
Last Name	Bingman	Birth Date/Age / /				
First Name/MI	Harold	Tobacco/Gender				
Title		SS#				
Birth Date/Age	09/01/1960 43	Misc. Information				
Tobacco/Gender	▼ Male ▼	Alphanum1				
Marital/Children#	Single 💌	Alphanum2				
Phone	[ )· · #	Cobra Beg/End / / / / / /				
Job Title		Pre.Ex.Cond				
Key Employee		Remarks				
Hire Date/Class	03/15/1999	<u>ـ</u>				
Compensation/SS#	75,000 · ·	<b>_</b>				
	OK Cancel Help					

Figure 10: The Group Census contact detail screen.