

Fast Class File

Client Data System

Contact Extract and Load

Whenever possible, E-Z Data recommends storing all contact data in one data base. However, should it become necessary to use more than one database to store your contact records, the contact Extract and Load feature makes it easy to transfer multiple contact records from one database to another at the same time.

The contact Extract and Load feature will ensure that all contact information, including Insurance Policies, Investment Positions, and SmartPad records are included when contact records are extracted from one database and loaded into another.

To Extract Contact Records from a Database –

- Open a **Contact** summary screen with the contacts that will be extracted from the database.

Note: To preserve contact key relationships when you extract contacts, you will need to ensure that all contacts identified as key relations are included in the extraction.

- Tag the records to be extracted or, if all records will be extracted, 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 **Extract Contact** in the **Record** menu.

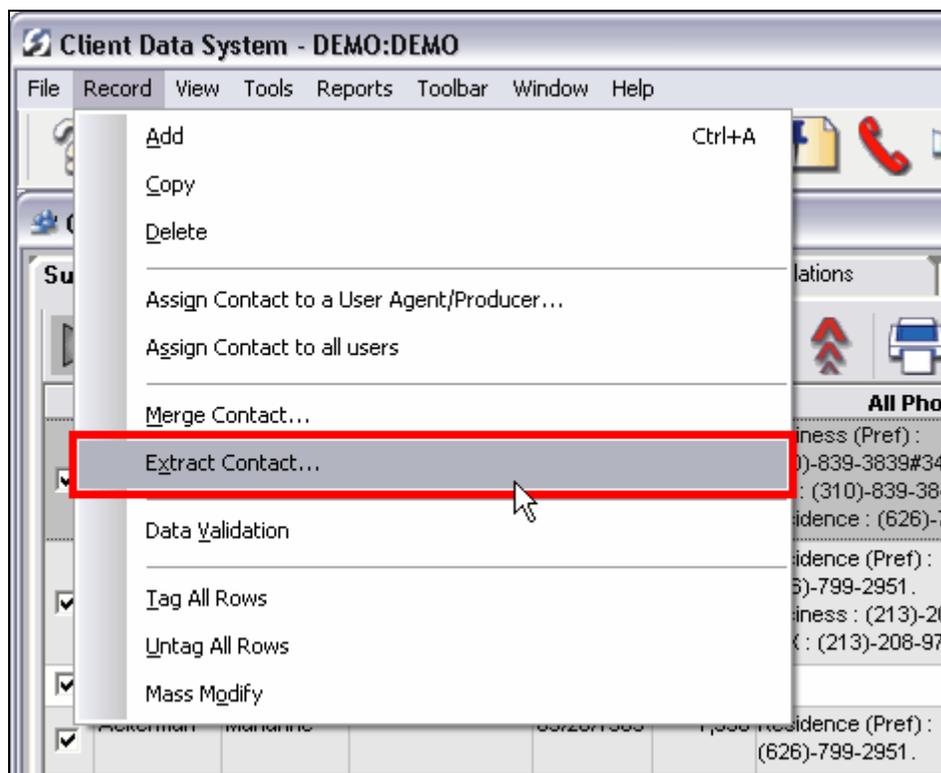


Figure 1: The Extract Contact Option in the Record menu of the Contact summary screen.



- Use the **Save As** window to select a location to save the .xml file that will contain the data from the extracted contacts.
- After selected the location of the .xml file, give the .xml file a name and click **Save**.

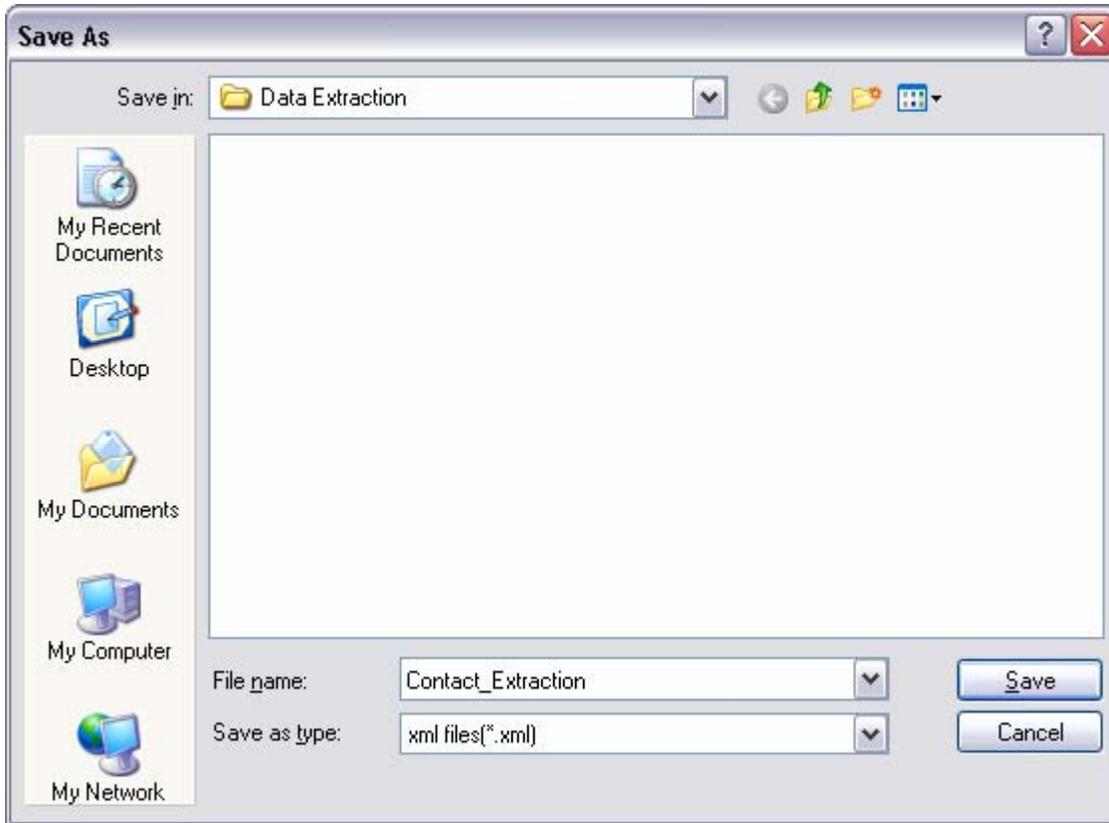


Figure 2: The Save As window.

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

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

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**.

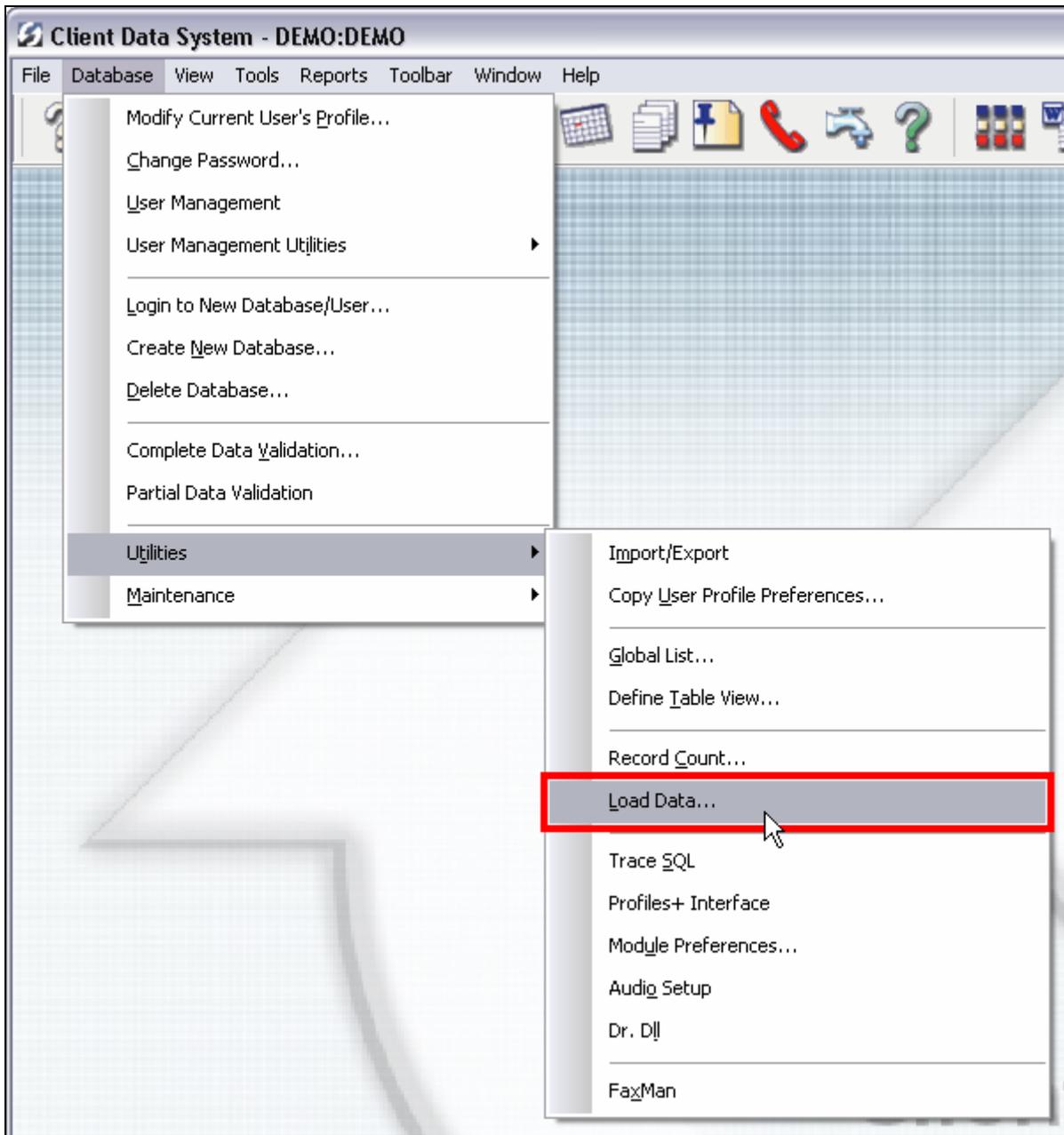


Figure 3: The Load Data option in the Utilities menu.

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

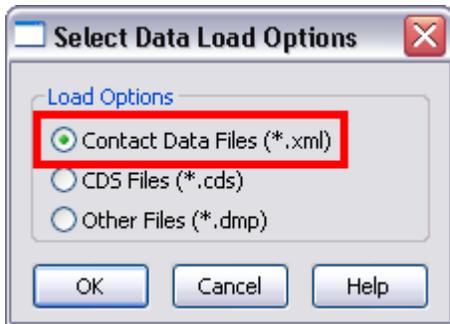


Figure 4: The Select Load Data Options window.

- Use the **Load File** window to locate the .xml file.

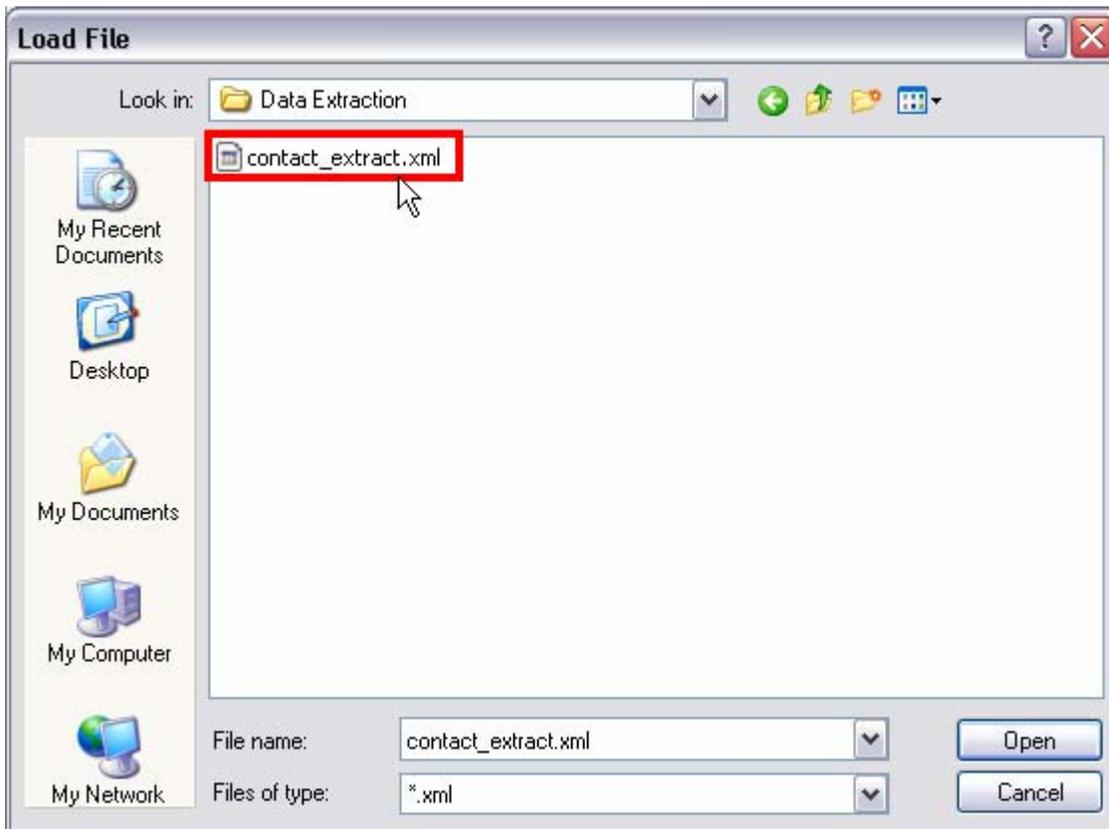


Figure 5: The Load File window.

- Select the .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.

Once the load process is finished, you can open a contact summary screen and verify that your records have been loaded successfully.