

# Fast-Class File

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.

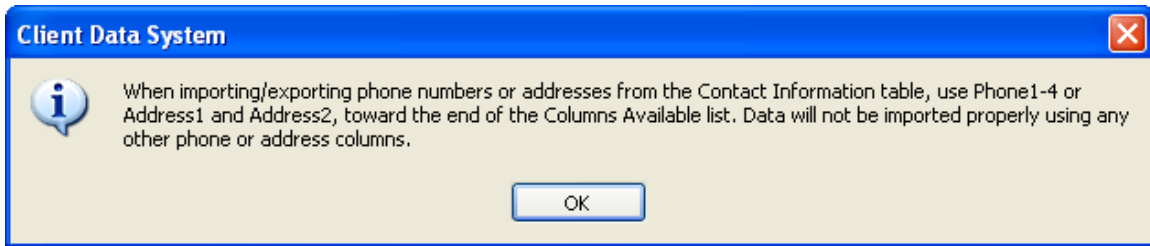
	A	B	C	D	E	F	G	H	I	J
1	Last Name	First Name	Gender	Marital	Street	City	State	Zip	Description	DOB
2	Roberts	Randy	Male	Married	568 Harris	Alhambra	CA	91536	Residence	8/16/1965
3	Humphries	Kay	Female	Married	229 Oaktre	Pasadena	CA	91106	Business	6/22/1974
4	Bingman	Harold	Male	Single	8596 Jeffer	Sierra Mac	CA	91056	Residence	9/1/1960
5	Vasquez	Paul	Male	Married	85 23rd Av	Glendale	CA	91682	Business	10/7/1978
6	O'Reilly	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
8										
9										

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.*

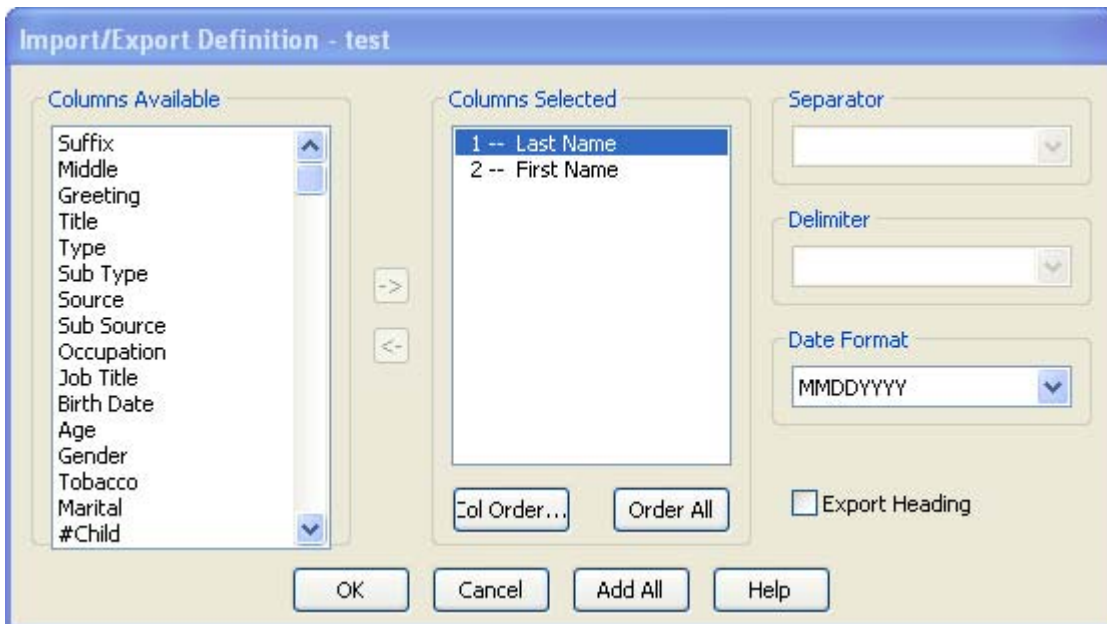
- Click **OK**.
- A warning message opens.



**Figure 2: Warning message**

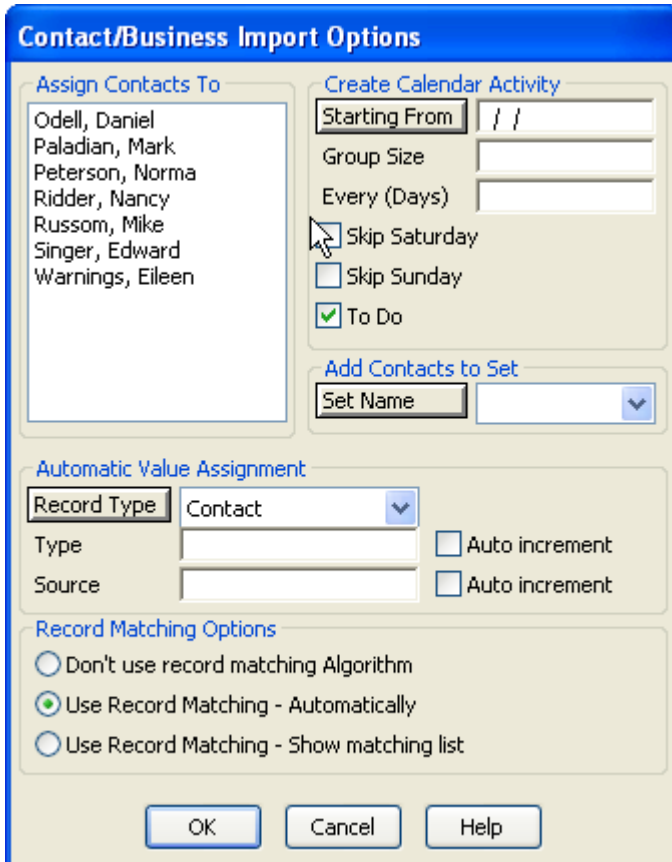
*Note: The message window warns that when you're importing or exporting telephone and address information, you need to use specific fields in the import or export definition.*

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



**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**.



**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 during 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**.