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Contact Import User Manual

The Contact Import Wizard is the primary vehicle for automated input (import) of contacts and companies stored in other software packages. MRSware has the ability to take "comma separated values"-formatted files (an industry standard spreadsheet format) and import the contents to create full contact and company entries in MRSware.

Creating the Import File

The file to be imported can be created by hand using any spreadsheet program, or exported from an existing program into a compatible file format for import. The import file needs to be in *comma separated values* format. This format is a standard means of representing data in a file and is compatible with a number of programs. The following is a short list of the most common programs for contacts, and references to those programs' manufacturers to help you get started with exporting your contacts from their application. For further reference, please refer to the manufacturer's documentation.

Microsoft Outlook
http://office.microsoft.com/en-us/outlook/HP030737641033.aspx

Microsoft Outlook Express
http://support.microsoft.com/kb/270670

Sage Software ACT!
http://itdomino.act.com/act.nsf/docid/13882

Maximizer Software Maximizer
http://support.maximizer.com/

PalmSource Palm Operating System
http://kb.palm.com/SRVS/CGI-
BIN/WEBCGI.EXE?New,kb=PalmSupportKB,CASE=obj(28734),ts=Palm_External2001

A similar function for exporting contacts from MRSware is available and described in the *Contact Export Wizard User Manual* available from the MRSware Documents page via the *Help* → *Documents* menu option in MRSware.

Importing Your Contacts

Now that you have your CSV file of contacts and companies, you can import them into MRSware.

MRSware will automatically create Company entries for Contacts in your file and associate them as appropriate. For example, if you have three sales reps that work for a distributor out of the distributor's central office, the import process will create the distributor's office as a Company and link the three sales reps to that Company.

Starting the Contact Import Wizard

To start the Contact Import Wizard, click on the MRSware menu option under *File* → *Import* → *Contact Import Wizard*. The Contact Import Wizard allows the user to both start a new import and adjust any previous imports completed.

Contact Import Wizard

Welcome to the Contact Import Wizard

This wizard will guide you through the process of importing contacts from another program or file into MRSware.

Contact Import Wizard Options
○ Run the wizard as normal
○ Jump to the Contact Options page in order to modify contacts that were added or updated by a previous import

< Back   Next >   Cancel

Select the first (default) option to start a new contact import.

Select the second option to be brought directly to the Contact Options page to adjust a pervious contact import.

Click *Next >* to continue after your selection is made.

Data Source Chooser

Select the file that contains your contacts (the .csv file) from your computer by pressing the "..." button next to the *Data File* entry text box.

Select the file format you are importing from. The *Generic CSV* is the most general format and will work with outputs from all programs, including those listed specifically below in this list. The *Outlook* and *Outlook Express* CSV file options will help by matching up fields for you automatically from those programs in the next screen. The *Maximizer XML* entry will allow you to import contacts from a Maximizer output file type called XML.
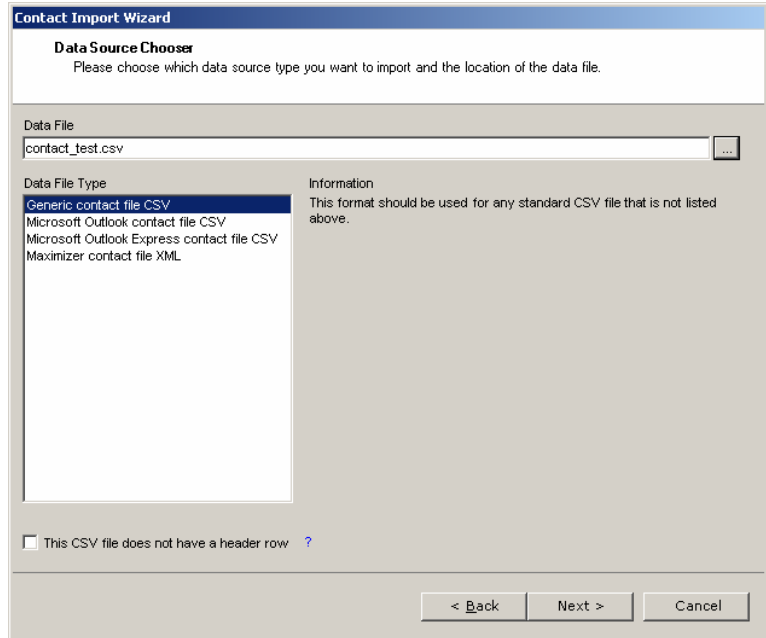
Your file should have a header row if possible – a header row is the first row of the file that contains the description of each column in the file. Some programs do not put out a header row, so MRSware has been designed to handle this situation. If your file contains no header row (you can open the file and look at the first row to determine this), then select the *This CSV file does not have a header row* option. This option will provide you a chance to name the columns for correct matching of data during the import process.

Set Mappings

Now you must set the "Mappings" to match up the column names from your import file to the fields in MRSware were the corresponding data should appear. The Contact Import Wizard does its best to match up the field names where they have similar names, such as *First Name* or *Job Title*. In many cases the column names you are importing may be significantly different in name then where you want the data to show in MRSware. For these cases, select the column name from your file on the right that matches to the MRSware field name listed on the left. For example, *Business Phone* in MRSware (as listed on the left side) may match up to *Telephone 1* in the file you are importing; select *Telephone 1* from the drop-down selector on the right where *Business Phone* is listed on the left.
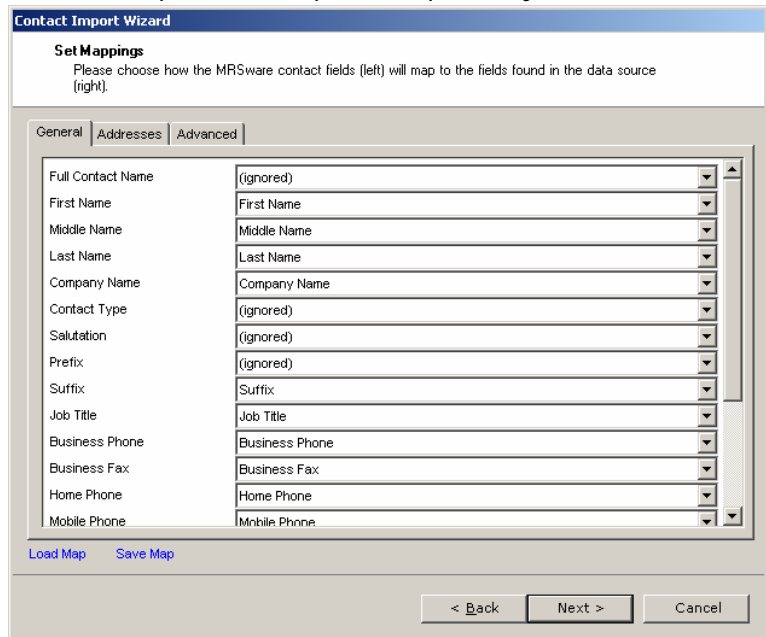
Once you have your mappings set correctly, you can save them for future use. Press the *Save Map* button to save the mappings. To load mappings in the future, use the *Load Map* button and select a saved map file.

Be sure to also make the correct associations on the Addresses tab for the various addresses of the companies and contacts.

The Advanced tab has an additional option which is commonly used. If your file being imported contains a column with a comma separated list of categories in it, this information can be imported and assigned appropriately in MRSware during the import process. An example of this would be if you had your contacts designated by market segment in your previous contact management program and would like to import this information into MRSware.

Press the *Next >* button once all the mappings are complete.
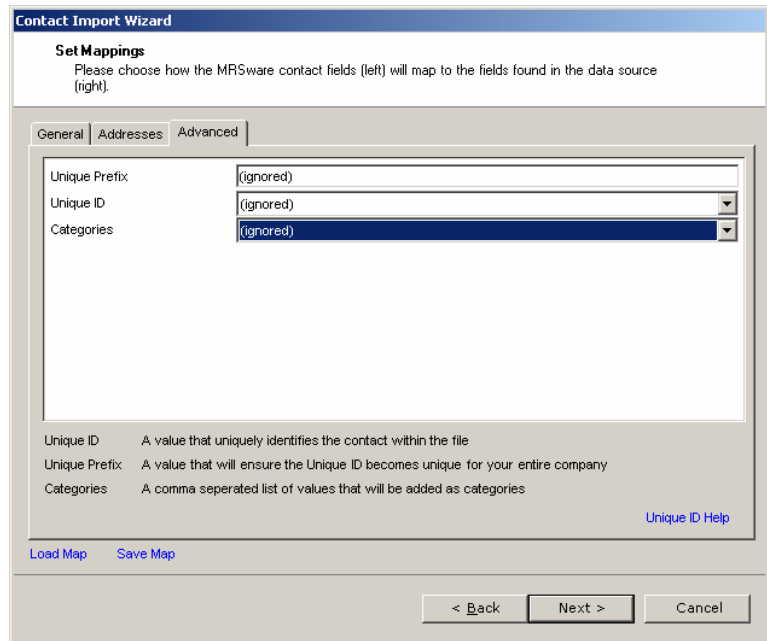
Categories and Additional Info

Any fields which did not get assigned to a MRSware field in the previous mapping stage are available at this point to be created as Additional Information items or Categories. This dialog allows the user to select which, if any, of these fields they would like to import as such.

Check off any columns in the first selection area to be created as Categories. The option *Prepend field name to category name* will add the name of the column to the Category in MRSware. For example, if the column name is *Buying Group*, the entry in MRSware would show as *Buying Group::* followed by the value of the column, i.e. *Buying Group::Northeast Distributors*.
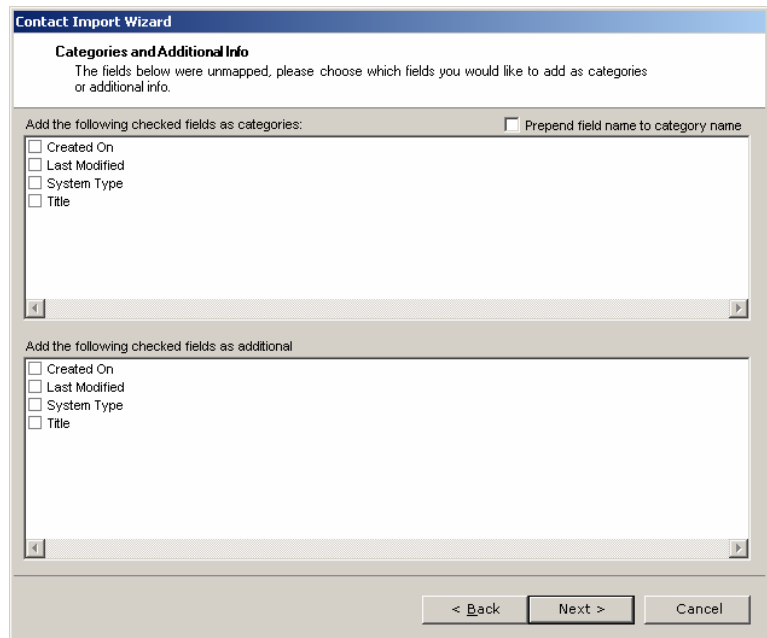
Check off any columns in the second selection that are to be created as Additional Information items.

Press the *Next >* button when all desired fields have been selected.

Set Merge Sensitivity

The Merge Sensitivity settings controls how contacts and companies being imported match up against existing contacts and companies in MRSware. This is the control for the process of how a contact gets created new or merged with an existing contact.

Typically the *System default* value is sufficient for most imports. This setting matches up contacts and companies based on name and contact information like phone numbers and addresses. If the name, phone number, or business address does not match, then the contact will be considered to be a new one and added as such. If these fields match between the existing MRSware contact and a contact being imported, then the two entries will be merged. A later step in the Contact Import Wizard allows the user to select which value of any conflicting fields to keep.

⚠ If importing a large database of known duplicate entries to those already in MRSware, where many of the entries may have differing names and/or contact information, it is recommended to use the *Match against existing contacts* option to let the system know that it should try to match contacts more aggressively – contacts with near matching names and addresses will now be considered matched more often – this will greatly reduce the number of duplicates that are create in MRSware. This situation typically happens when you are trying to merge several separately maintained contact databases into MRSware (as you would when first moving to MRSware when many different users are now consolidating their personal databases into a company shared database).

Preprocessing the Import

Preprocessing the import file is like performing a test run on the data to make sure the results are as you expected. It is recommended to preprocess the file whenever an import is done for the first time.

Select *Yes* and press the *Next >* button to perform the preprocessing test run.

The file will be uploaded to the server network and a test run import performed. Once the test run is complete, the *Processing Progress* bar will be completely blue.

Press *Next >* to continue.
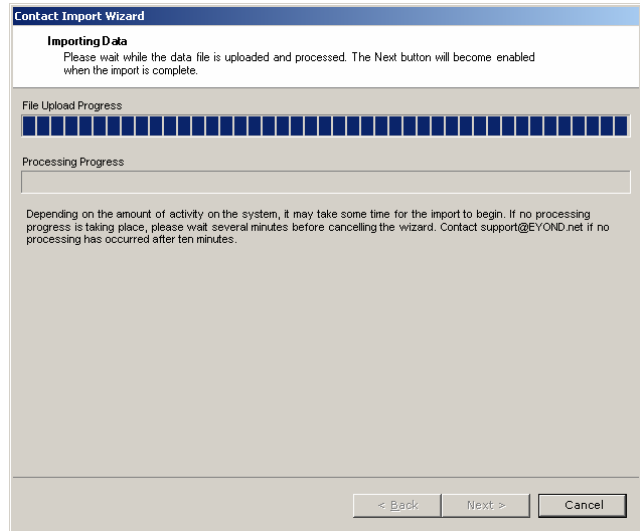
The next screen of the wizard will show you the results of your import test run and warn you if there were a significant percentage of errors. If there are many errors, please press the *< Back* button to go back and adjust the field mappings, looking for a possible mismatched field. If you help determining the problem source of an import file, please contact support@eyond.net for assistance.

Once you are satisfied with your preprocessing results, press the *Next >* button to continue the import.
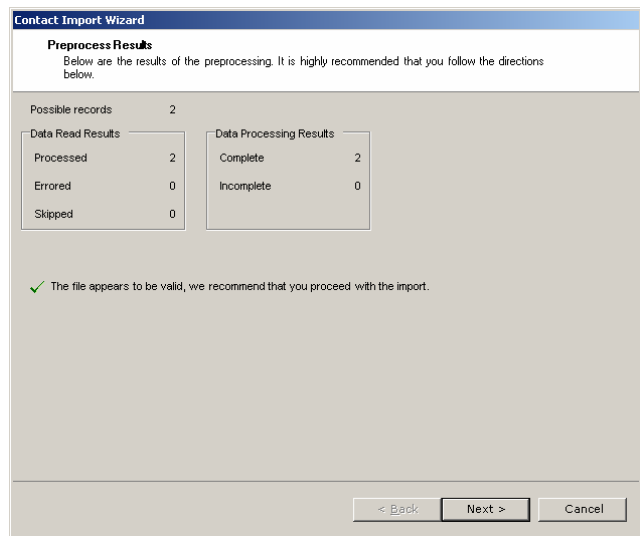
Confirm Options

The Confirm Options page gives the user a summary of what is being done and a chance to go back and review the import settings before performing the import. Click *Next >* to begin the import.
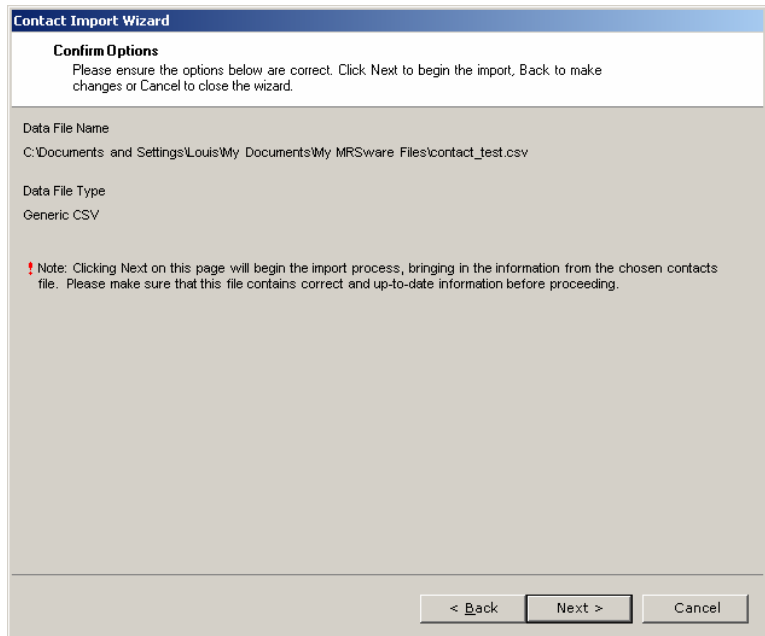
Importing Data

Once the import is initiated, the contact file will be uploaded to the server network and processing will being. The *Processing Progress* bar will fill blue as the contacts are being imported. Depending on the size of the file being imported (i.e. the number of contacts), this process may take some time.

Once the progress bar is completely filled in, press the *Next >* button.
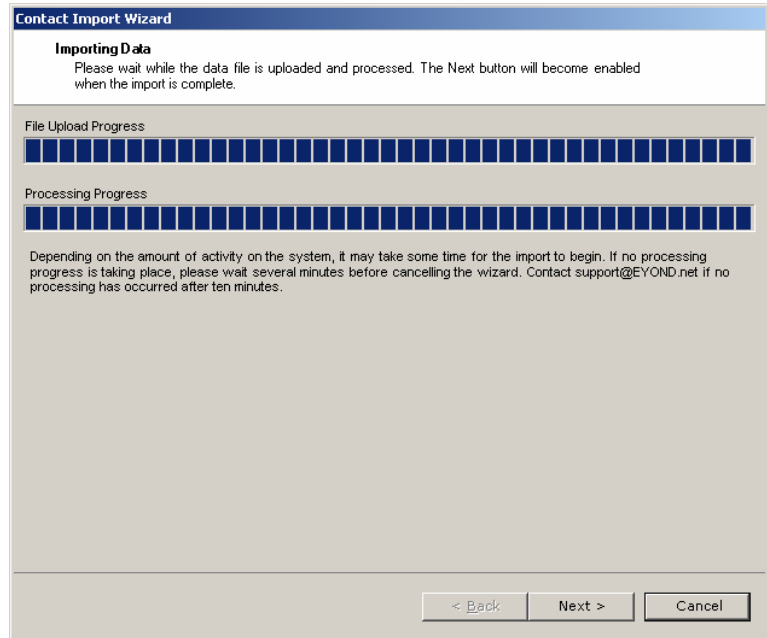
Resolving Conflicts

In some cases the import process will be unable to resolve certain items between the file being imported and the existing contacts in MRSware. For these cases a *conflict* is generated. You have the option to resolve the conflicting items now or come back o them at any time in the future.

To resolve the conflicting items now, select *Yes* and press *Next >*.
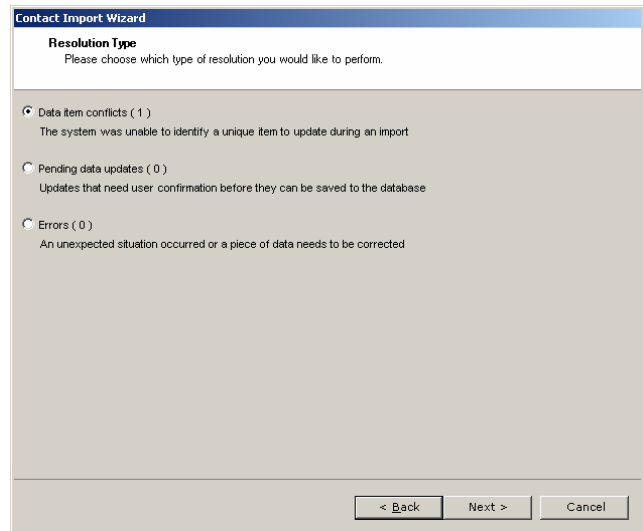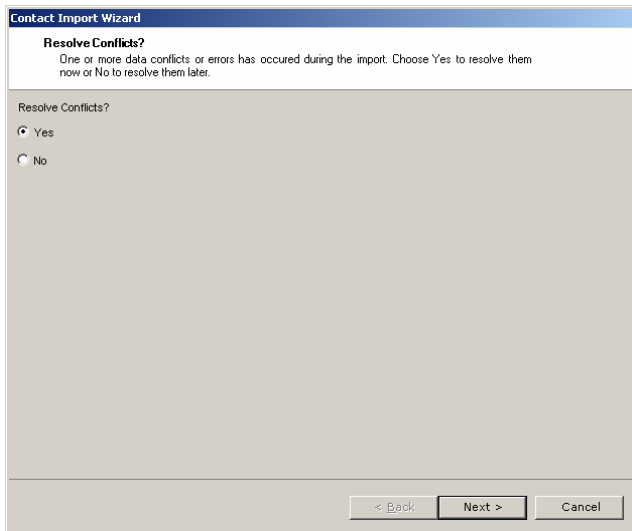

Data Item Conflicts

The first type of conflict is called a *Data item conflict*. This is typical of importing a contact where there are two or more possible matches in the system. Select the *Data item conflict* type and press *Next>* to resolve it.

The item conflicts will be listed. Select the conflict you wish to resolve from the list and press *Next >*.
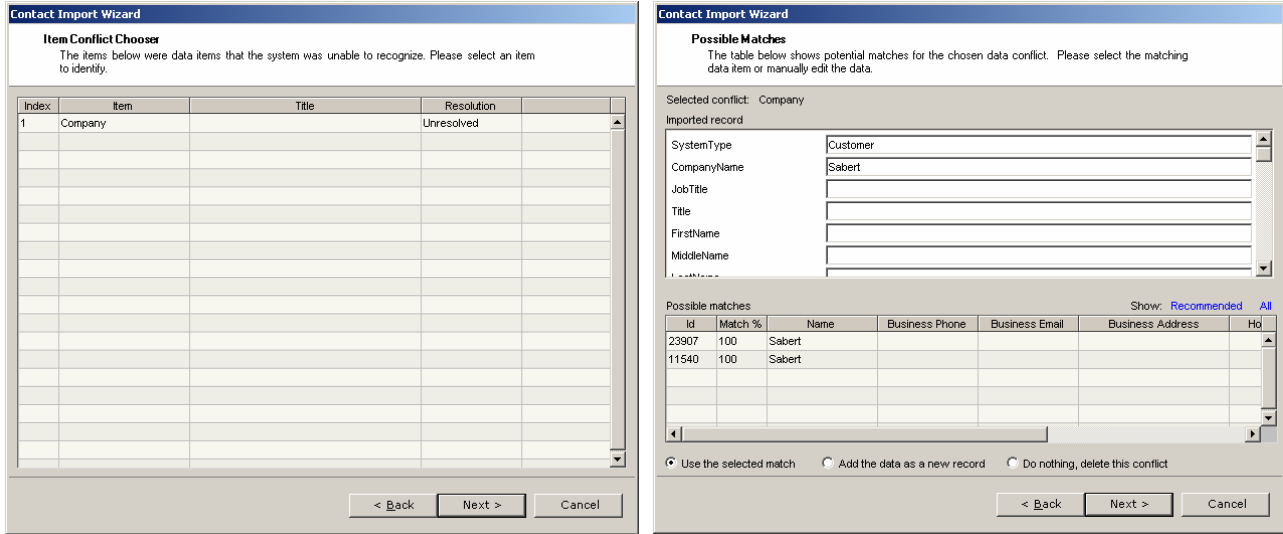
A typical conflict will look like the item above, right. This conflict shows that there are two possible matches for this company already in the database. A number of different circumstances can produce a conflict like this, such as mismatching contact information, slight naming variations, and duplicate contacts. Select the appropriate match from the lower list based on the contact information being imported, which is shown in the upper list. If this is a new contact – i.e. the contact is not matching one that is in the *Possible Matches* list – then select *Add the data as a new record* option. Press the *Next >* button when your selection is complete.

The system will prompt you to continue resolving conflict items and whether to make the same choice made here for other conflicts that match this (now) resolved conflict.
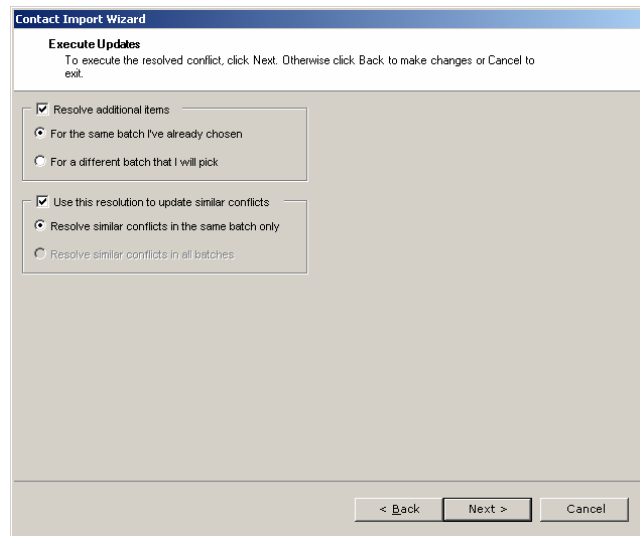

Pending Data Updates

The second type of conflict is a *Pending data update*. This is the case of a contact being imported matching an existing contact in MRSware but having different contact information. The following resolution process will allow you to select which piece of information you wish to keep. Select *Pending data updates* and press *Next >*.

For this type of conflict, the user is presented with a list of the conflicting items and where the conflict occurs. For each row in the list, select the item and choose to one of the options by clicking the blue link at the bottom of the list:

- *Use New Value*
  Choosing this option will use the value shown in the *New Value* column of the table. This is the value that was imported from your file.
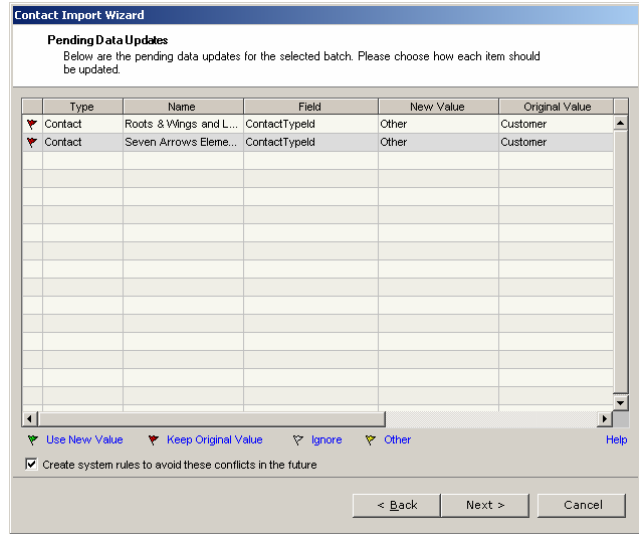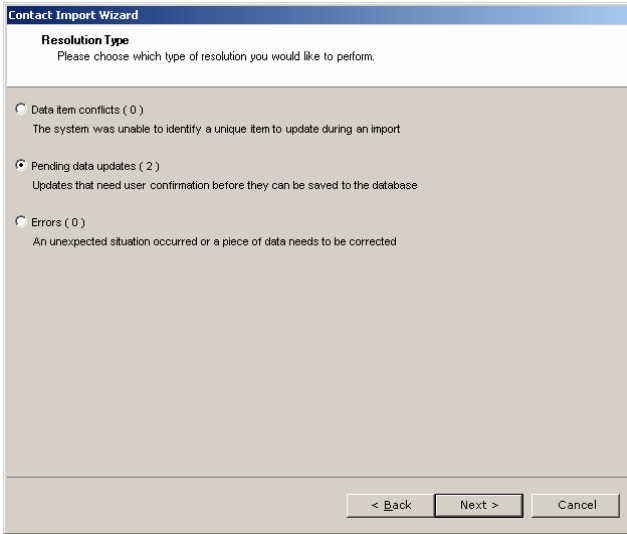

- *Keep Original Value*
  Choosing this option will keep the value shown in the *Original Value* column of the table. This is the value already in existing contact.
- *Ignore*
  Choose this option to leave the conflict unresolved and return to it later.
- *Other*
  This option allows the user to input any value desired instead of selecting either the new or original values presented here.

Users can multi-select in this table – as can be done in many of the tables in MRSware – by using the Shift or Ctrl keys in conjunction with clicking on an item to select it. Group Select: select the first item of the group, hold the Shift key, select the last item of the group to have all items in the list between the two selected. Multiple Select: select the first item, hold the Ctrl key, select additional items to have them all selected at once.

There is an option to *Create system rules to avoid these conflicts in the future* option at the bottom of the table. This will create an import rule that will cause any future imports that have the same conflict to be resolved in the same way selected automatically.

The Execute Updates page summarizes the changes made and gives the user a chance to return to the previous page and make any desired changes. Use the *< Back* button to return to the previous page. Press *Next>* when ready to complete the changes selected.
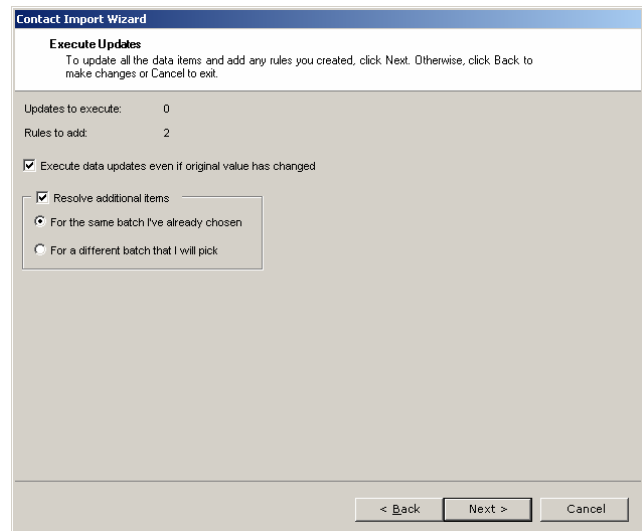
Contact Options

The Contact Options page of the wizard gives the user the ability to mark contact and/or companies as Private and/or Hidden, and Assign Categories and/or Types.

Private

Selecting the Private option will make the corresponding contact or company entry only show in your listing in MRSware. This feature is typically used when importing a contact that is personal in nature that you wish to have in your contacts list but not necessarily share with other users in your company.

Hidden

Selecting the Hidden check box next to a Company or Contact will cause that entry to be not shown in the default listing when going to the corresponding shortcut in MRSware. The Hidden entries can be shown in the listing by selecting *Show Hidden* from the MRSware menu option. This feature is designed to help users keep the list from becoming to large to easily navigate and manage.

Categories and System Types

Right-click on a contact (one or multiple) to access the *Assign Categories* and *Assign Types* menu options. These options allow the user to assign either categories of types to the contacts and/or companies during this final step of the import process. Checking a Category or multiple Categories from the list will assign that Category to all of the selected contacts/companies. Selecting a Type from the Assign Types dialog will assign that Type to all of the selected contacts/companies. To add or edit categories or types, use the corresponding menu option in MRSware under *Go To → Contact Relationship Management → Manage Contact*.
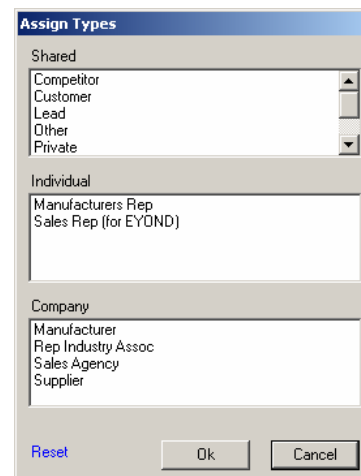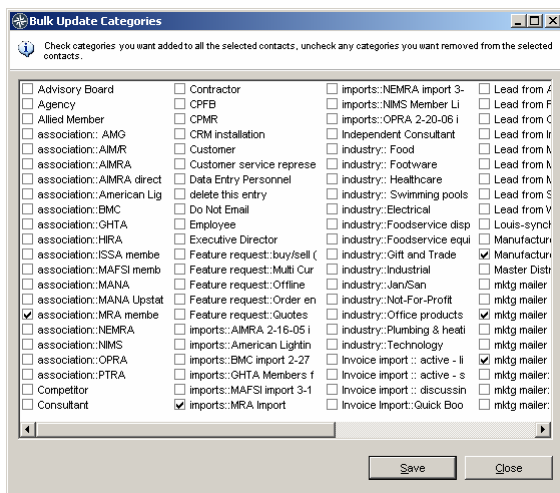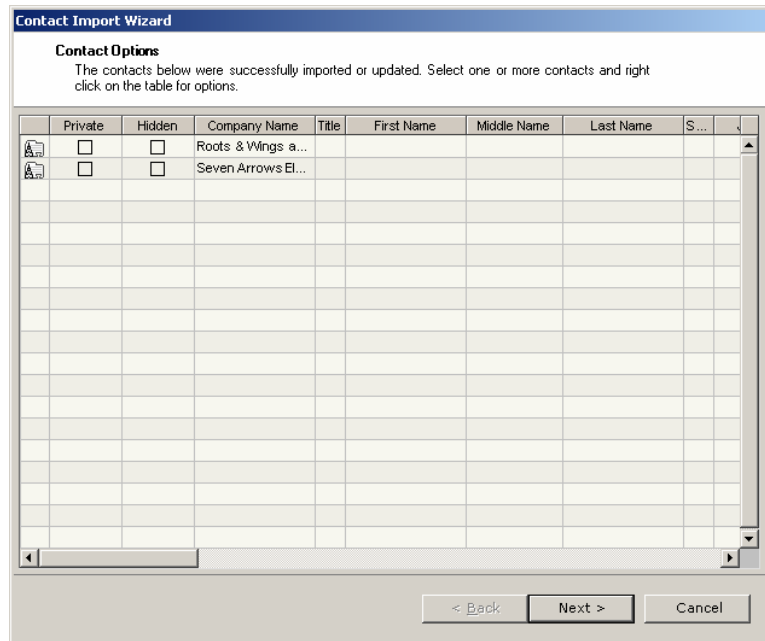
Contact Import Wizard Complete

This completes the Contact Import Wizard. Press the *Finish* button to complete the changes made and close the wizard.
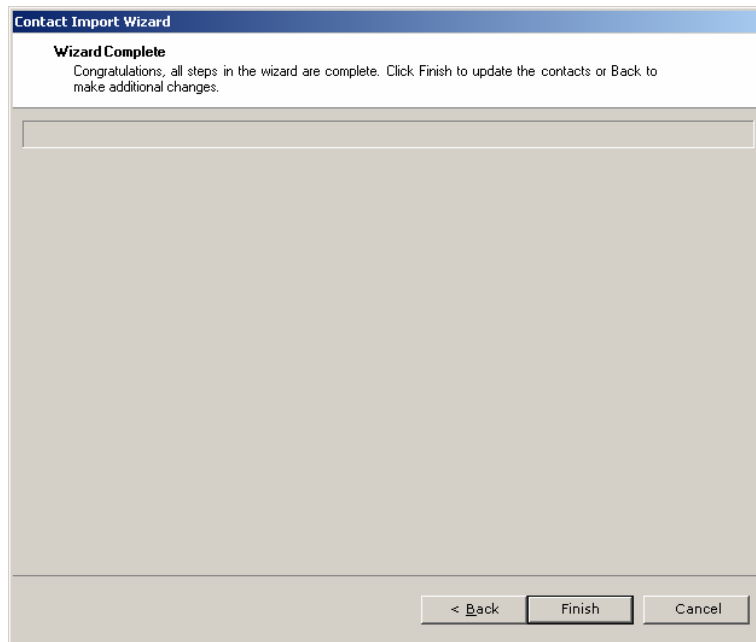
Σ

Σ This user manual can be downloaded from the MRSware Documents page through the *Help →Documents* menu in MRSware.