



Importing Contacts

User Guide

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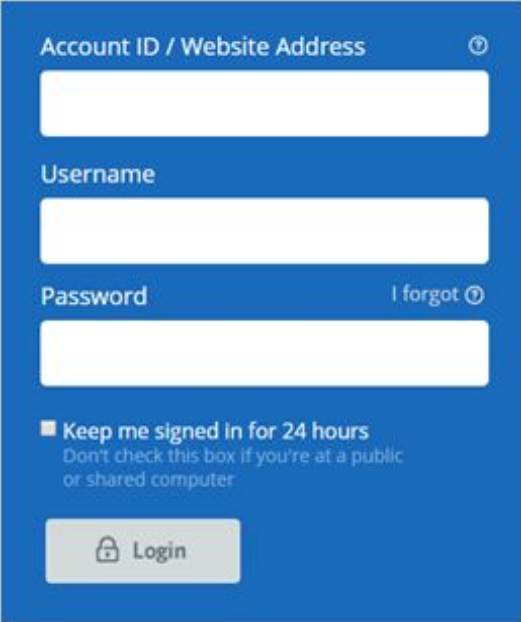
- Login
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Logging In

- Go to structuredweb.com and click **Login**.
- Enter your **Account ID, Username** and **Password**.

Note: If you forget your login information you can reset it by selecting the **I Forgot** link above the password field.

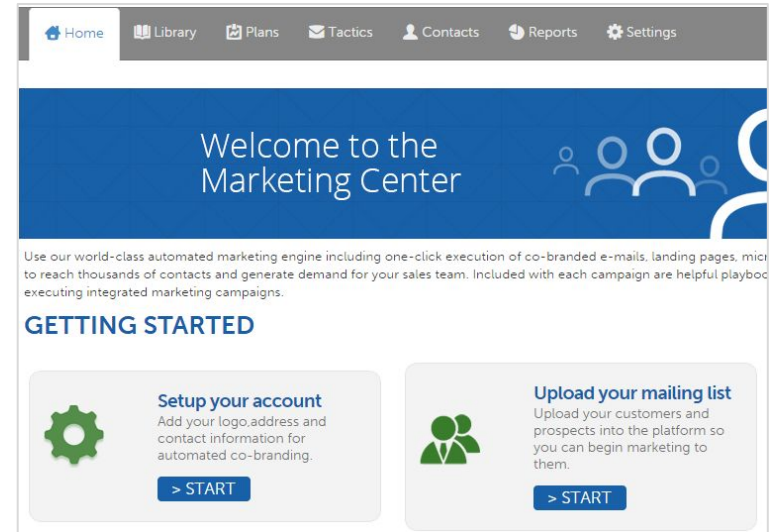


The image shows a login form with a blue background. It contains three input fields: 'Account ID / Website Address', 'Username', and 'Password'. The 'Password' field has a link 'I forgot' next to it. Below the fields is a checkbox labeled 'Keep me signed in for 24 hours' with a sub-note: 'Don't check this box if you're at a public or shared computer'. At the bottom is a 'Login' button with a lock icon.

Getting There

- After logging in you are brought to the **Marketing Center**.
- The Marketing Center is where you can manage and execute your campaigns.

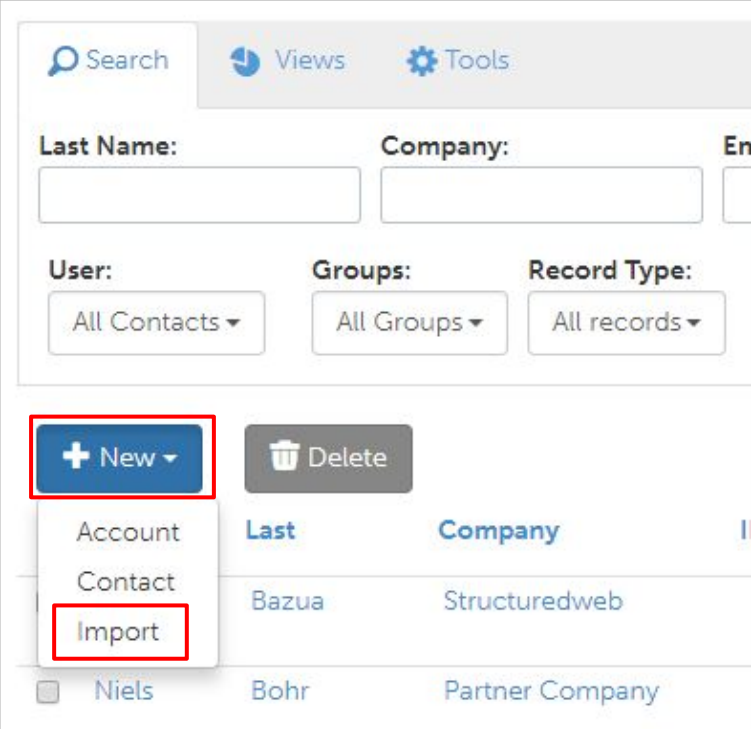
Note: If you are not in the Marketing Center, select it from the drop down menu in the upper right hand corner.



Getting There

- Click on the **Contacts** tab to access your database.
- Click **New** and select the **Import**.

Note: You can also access the **Import** from within the **Mailing List** tab of an email campaign you have already created.



The screenshot displays the StructuredWeb interface for managing contacts. At the top, there are navigation options: Search, Views, and Tools. Below this, there are input fields for 'Last Name:' and 'Company:', and a dropdown menu for 'User:' set to 'All Contacts'. There are also dropdown menus for 'Groups:' (set to 'All Groups') and 'Record Type:' (set to 'All records'). A '+ New' button is highlighted with a red box, and its dropdown menu is open, showing options for 'Account', 'Contact', and 'Import', with 'Import' also highlighted by a red box. To the right of the dropdown is a 'Delete' button. Below the buttons, a table shows a list of contacts with columns for 'Last' and 'Company'. The visible rows are: 'Bazua' from 'Structuredweb' and 'Niels' from 'Bohr' (Partner Company).

Last	Company
Bazua	Structuredweb
Niels	Bohr Partner Company

Import Wizard - File Select

- To upload your file click **Choose File**, locate the file on your computer and select the **Open** button.
- CSV and Excel files are acceptable file formats.
- After selecting your file and accepting the data agreement, click **Upload**.

Import Contacts

Select the Excel (XLS/XLSX) or CSV file you would like to import.

[Outlook-specific instructions](#)
[More info on CSV files](#)

Demo import.csv

First row contains field names
[▶ Advanced Options](#)

Check here to indicate that you have read and agree to the following terms of the StructuredWeb data privacy.

Data Processing and Privacy Agreement
You represent and warrant that your use of StructuredWeb will comply with all applicable laws and regulations. You're responsible for determining whether our Services are suitable for you to use in light of any regulations like HIPAA, GLB, EU Data

Import Wizard - Import Preview

- The Import Preview allows you to preview the imported file.
- Settings are automatically set for you on this page, click **Continue** to be brought to the next step in the wizard.
- This loads the Field Relationship page.

Preview import file

This page allows you to preview the imported file and change defaults if needed. You can change the defaults for the **Delimiter** and **Qualifier**. The **Delimiter** is the character which separates fields, and is usually a comma (.). The **Qualifier** is the character that encloses fields, and is usually a double quote ("). Some CSV generating software enclose each field with the Qualifier, while other software export only fields that contain the Delimiter character as part of the field. (Example: "this comma. is delimiter!")

HINT: If the software that generates the CSV does not give you a choice on a qualifier, assume it is a double quote.

Select Delimiter Character	Select Qualifier Character
<input checked="" type="radio"/> Fields delimited by Comma	<input checked="" type="radio"/> Fields qualified by Double Quote (")
<input type="radio"/> Fields delimited by Tab	<input type="radio"/> Fields qualified by Single Quote (')
<input type="radio"/> Fields delimited by Semicolon	

First line contains Field Titles Mac/UNIX line separator

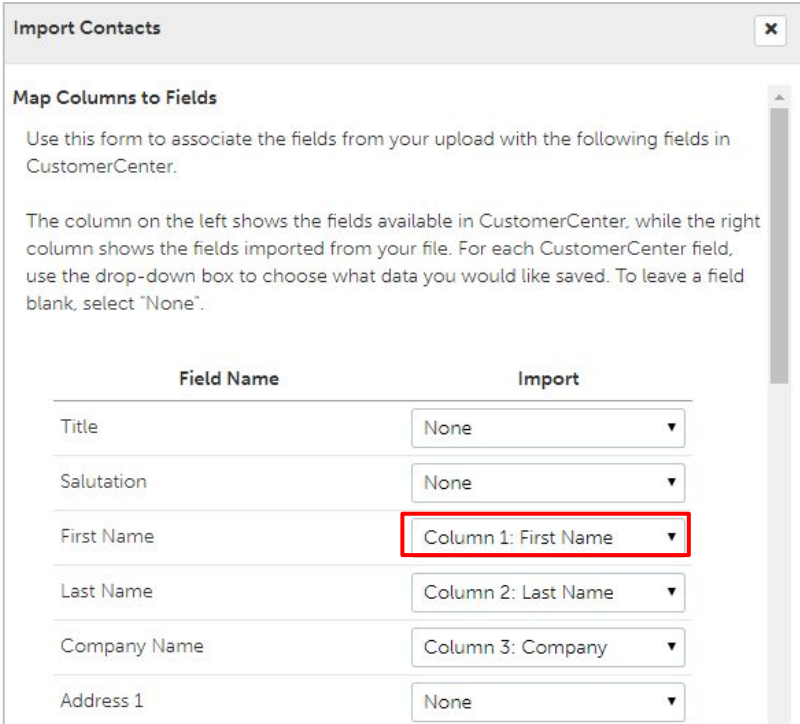
Preview of imported file

You can examine the file to be imported, to verify that the first line contains the field titles, and that the delimiter and qualifier characters are what you expect.

```
First Name,Last Name,Company Name,Address,City,State,Zip Code ,Email Address
Mark,Ritchie,StructuredWeb,20 West 20th Street,New York,NY,10011,markr@structuredweb.com
John,Smith,StructuredWeb,20 West 20th Street,New York,NY,10011,john@structuredweb.com
```

Import Wizard - Field Matching

- The left column displays the fields in StructuredWeb while the right column displays the fields in the import file.
- The system automatically matches fields for you. Double check to make sure they match properly. If needed, select the drop down menu and choose the correct field.
- After all fields have been matched, click **Continue**.



Import Contacts

Map Columns to Fields

Use this form to associate the fields from your upload with the following fields in CustomerCenter.

The column on the left shows the fields available in CustomerCenter, while the right column shows the fields imported from your file. For each CustomerCenter field, use the drop-down box to choose what data you would like saved. To leave a field blank, select "None".

Field Name	Import
Title	None
Salutation	None
First Name	Column 1: First Name
Last Name	Column 2: Last Name
Company Name	Column 3: Company
Address 1	None

Import Wizard - Group Select

- Import your contacts into a group. This group is how you can find this list again for future use. By default you can import the contacts into a **new group**.
- To update a previous list you can import into an **existing group**.
- Select your desired option and click **Run Import**.

Import Contacts

Import into Group(s)

Choose how contacts will be sorted into groups

Import into a single existing group:

Select existing group

Import into a single new group:

Import on 6/19/2018 at 12:54 PM

Import into multiple groups based on imported data:

Field containing group name(s):

Column 1: First Name

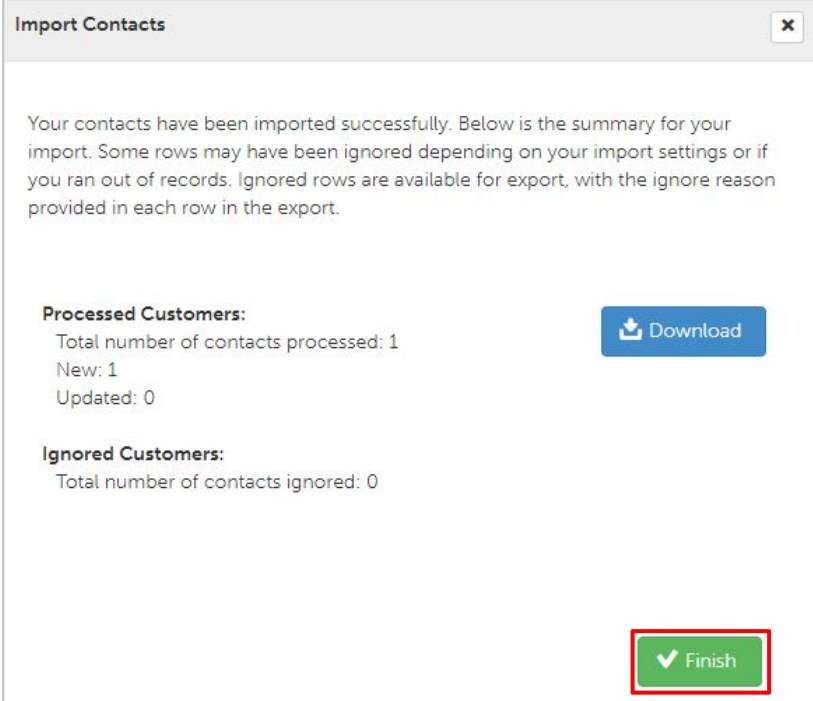
Create new groups from unrecognized group names

Multiple values, separated by: None

[Go back](#) [Run Import](#)

Import Wizard - File Upload

- This begins the import process. Depending on your file size it can take a few seconds to a few minutes.
- When the import is complete you are brought to a summary page. It breaks the import down into three groups:
 - **New:** Added for the first time.
 - **Updated:** Shows contacts already imported that were updated based on the import.
 - **Ignored Customers:** Not been added due to the reasons listed in the wizard. These can be **exported** into a separate file.



Import Contacts

Your contacts have been imported successfully. Below is the summary for your import. Some rows may have been ignored depending on your import settings or if you ran out of records. Ignored rows are available for export, with the ignore reason provided in each row in the export.

Processed Customers:
Total number of contacts processed: 1
New: 1
Updated: 0

Ignored Customers:
Total number of contacts ignored: 0

[Download](#)

[Finish](#)

Additional Help

- Email
 - ✓ service@structuredweb.com
- Call - 24/5 Support
 - ✓ US: 1-888-584-6480
 - ✓ UK: +44 2035141806
 - ✓ Australia: +61 280155849
 - ✓ Germany: +49 32221090193
 - ✓ France: +33 975181385
 - ✓ Japan: +81 345781761
- Live Chat - 24/5 Support
- Visit our online Support Center
 - ✓ support.structuredweb.com

Basic Importing

Last Updated: Dec 01, 2014 03:38PM EST

You can import contact into StructuredWeb via a CSV file. Comma separated files are text files generated by most popular software in a loosely defined format; mainly fields are separated by one predefined character, usually a Comma or a Tab. In some cases, each field is enclosed by a pair of Qualifier characters, usually a double or single quote. These files can be generated in Microsoft Excel and then saved as a .CSV file type. You are also able to import contacts using XLS and XLSX files.

A basic import of contact records includes basic contact information such as First Name, Last Name, Company, Address, City, State and Postal. If you need to import group or profile information you need to run an advanced import.

Create fields relationship

The import and click the... Use this form to associate the fields from the CSV file with their corresponding fields in CustomerCenter. The column on the left shows the fields available in CustomerCenter. For each field in the CSV file, click the dropdown box to choose the corresponding field in CustomerCenter. If you select "None", the field will be imported from your CSV file as a field blank.

CustomerCenter Fields	Fields to be Imported
Title	None
Salutation	None
First Name	First Name <Field No: 1>
Last Name	Last Name <Field No: 2>
Company Name	Company Name <Field No: 3>
Address 1	Address <Field No: 4>
Address 2	Address <Field No: 4>
City	City <Field No: 5>
State	State <Field No: 6>
Zip	None
Country *	None
Region	None
E-mail	None
Phone	None
Fax	None