



Importing Contacts

User Guide

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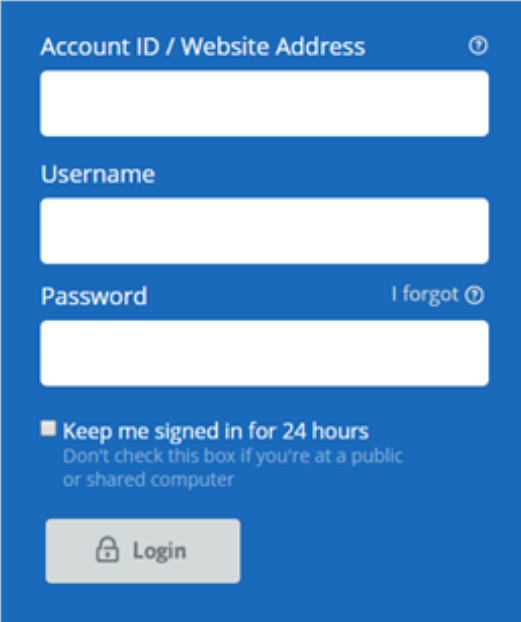
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Logging In

- 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.

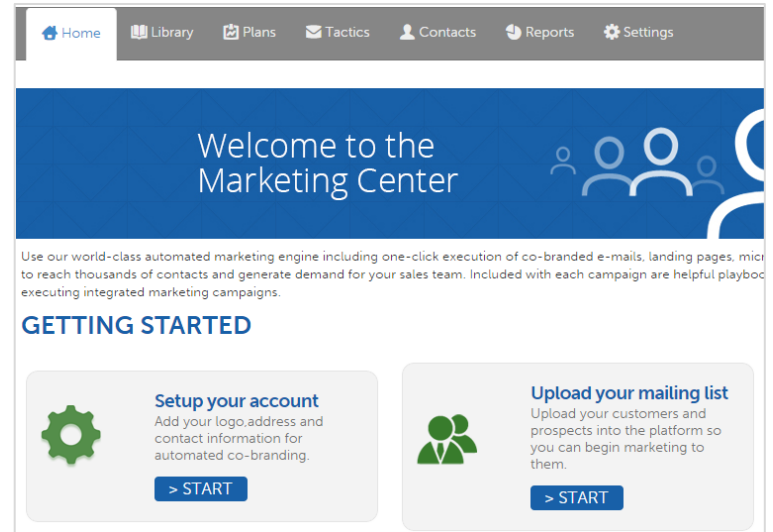


The image shows a login form with a blue background. It contains three input fields: 'Account ID / Website Address', 'Username', and 'Password'. The 'Password' field has a link 'I forgot' next to it. Below the fields is a checkbox labeled 'Keep me signed in for 24 hours' with a sub-note: 'Don't check 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.

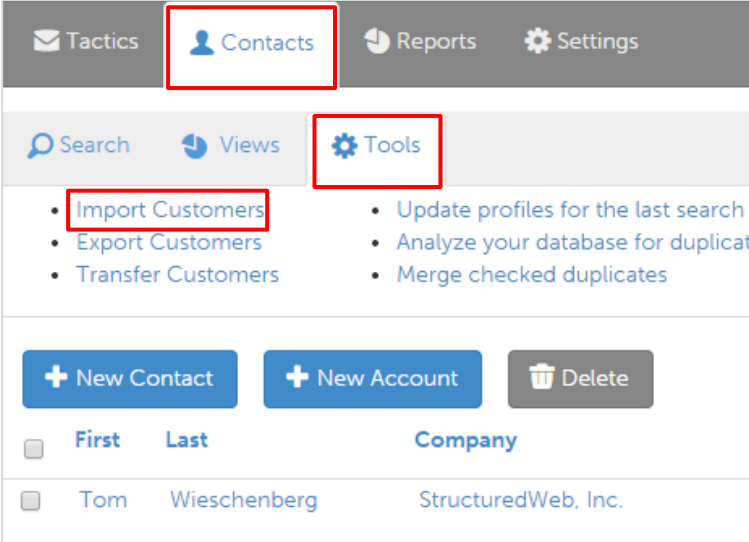
Note: If you are not in the Marketing Center, select it from the drop down menu in the upper right hand corner.



Getting There

- Click on the **Contacts** tab to access your database.
- To start the import wizard select **Tools** and click **Import Customers**.

Note: This process can also be started in the Customer Center or Lead Management sections of the platform. You can access these in the drop down menu on the upper right hand side.




The screenshot displays the StructuredWeb interface. At the top, there is a navigation bar with tabs for 'Tactics', 'Contacts', 'Reports', and 'Settings'. The 'Contacts' tab is highlighted with a red box. Below this, there is a secondary navigation bar with 'Search', 'Views', and 'Tools'. The 'Tools' tab is also highlighted with a red box. Under the 'Tools' tab, a dropdown menu is visible, listing several options: 'Import Customers', 'Export Customers', 'Transfer Customers', 'Update profiles for the last search', 'Analyze your database for duplicates', and 'Merge checked duplicates'. The 'Import Customers' option is highlighted with a red box. Below the dropdown menu, there are three buttons: '+ New Contact', '+ New Account', and 'Delete'. At the bottom, there is a table with columns for 'First', 'Last', and 'Company'. The first row of data shows 'Tom', 'Wieschenberg', and 'StructuredWeb, Inc.'.

	First	Last	Company
<input type="checkbox"/>	Tom	Wieschenberg	StructuredWeb, Inc.

Import Wizard

- There are two options to import the file: **Basic** and **Advanced**.
- The advanced options let you import profile and group information, making organization easier.
- Select **Advanced** and click Continue.

Note: The basic import uploads contact information only.



Welcome to CustomerCenter customer import

Please select your import type

Basic
The basic import will let you select basic customer information such as their first name, last name, and contact information and import them into your CustomerCenter.
This is the quickest way to get your customers into CustomerCenter.

Advanced
The advanced import will present you with various options on how to process your customers while being imported. For instance, if you wanted to import your customers into new/existing groups or your import file contains username, password, profile information etc., you need to select this option.
This option will require you to provide additional information about your import file.

Continue -->

Import Wizard - Advanced Options

- This loads a list of available options for the advanced importing including profile, group and record owner options.
- Grouping contacts allows you to quickly access the contacts.
- Check off **Import records into group(s)** and click **Continue** to move onto the next step.

Select advanced options

This tool will allow you to import your existing data into CustomerCenter.

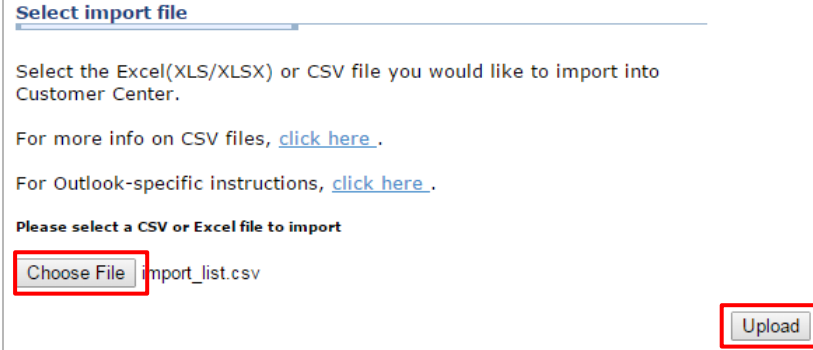
By default, all new records will be imported as contacts, with you as the record owner without being placed in a specific group or profile. Existing records will be updated non-empty fields from the imported data.

To change these default settings, select any of the options below.

- Import records using last update time logic [More info](#)
- Do not update empty fields [More info](#)
- Do not update existing records [More info](#)
- Import data contains unique record ID [More info](#)
- Import data contains username [More info](#)
- Import data contains password [More info](#)
- Import records into group(s) [More info](#)**
- Associate **all** records with pre-existing profile(s) [More info](#)
- Create new profile(s) based on import field names [More info](#)
- Associate records with profile(s) based on import data [More info](#)
- Set record owner based on import data [More info](#)

Import Wizard - File Select

- To upload your file click **Browse**, locate the file on your computer and select the **Open** button.
- CSV and Excel files are acceptable file formats.
- After selecting your file, click **Upload**. This loads the import Preview screen.



Select import file

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

For more info on CSV files, [click here](#).

For Outlook-specific instructions, [click here](#).

Please select a CSV or Excel file to import

import_list.csv

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 enclose 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

- Fields delimited by Comma
- Fields delimited by Tab
- Fields delimited by Semicolon

Select Qualifier Character

- Fields qualified by Double Quote (")
- Fields qualified by Single Quote (')

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
```

Next 3 Lines

<-- Back Continue -->

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** and confirm the fields on the next page.

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
Mobile Phone	None
Home Phone	None
Web Address	None
Notes	None
noEmail	None
noFax	None
noCall	None

* If you don't select a Country, new contacts will be assigned your country, United States.

<--- Back Continue --->

Import Wizard - Group Select

- Choose how you want to import the contacts into groups. You have three options:
 - Import into an existing group:** Use the drop down to select a previously created group within the system.
 - Import into a new group:** Create a new group by entering the name into a text field.
 - Import into multiple groups:** Creates groups based on data within the import file. Selecting this option requires a column to be added into the file with the group name listed.
- Select your desired option and click **Continue** and confirm your selection on the next page.

Import into Group(s)

Select the logic by which customers will be sorted into group(s). [More info](#)

Import into an existing group:
None

Import into a new group:
Prospects

Import into multiple groups:
Select the field which contains the group name.
None

Create new groups based on field content
Multiple groups; separated by None

<-- Back Continue -->

Confirm Group options

Double-check to make sure that you have made the correct group selection.

All customers in this import will be placed in the following group:
Prospects Group

<-- Back Continue -->


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:
 - **Updated Customers:** Shows customers already in the CRM that were updated based on the import.
 - **New Customers:** Added for the first time.
 - **Ignored Customers:** Not been added due to the reasons listed in the wizard. These can be exported into a separate file.

Your contacts are currently being uploaded into CustomerCenter. Depending on the size of the file, this operation might take a few minutes.

Please do not close this window until completed.

5 records processed



Import summary

Your contacts have been uploaded into CustomerCenter. The following list summarizes the upload. If a contact already existed in CustomerCenter, it was updated with the information from the file uploaded.

Close

Ignored Customers (reason)	Updated Customers	New Customers
		Mark Ritchie
		John Smith
		Gerard Suppa
		Adam Krapish
		Leon Smith

Additional Help

- Email
 - ✓ service@structuredweb.com
- Phone
 - ✓ 888-584-6480
- Online Support Center
 - ✓ support.structuredweb.com
- Product Walk Thru
- Chat

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 form and click the "Next" button. 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, select the corresponding field in the dropdown box to choose. If a field is not available, select "None".

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