Fast·Class File

Client Data System

Volume 39: Data Import

Before data can be imported into CDS, it must be organized in a file format that can be interpreted by CDS. One file type that CDS can read is Comma Separated Value or .csv. Microsoft Excel can be used to format data and save it in .csv file format.
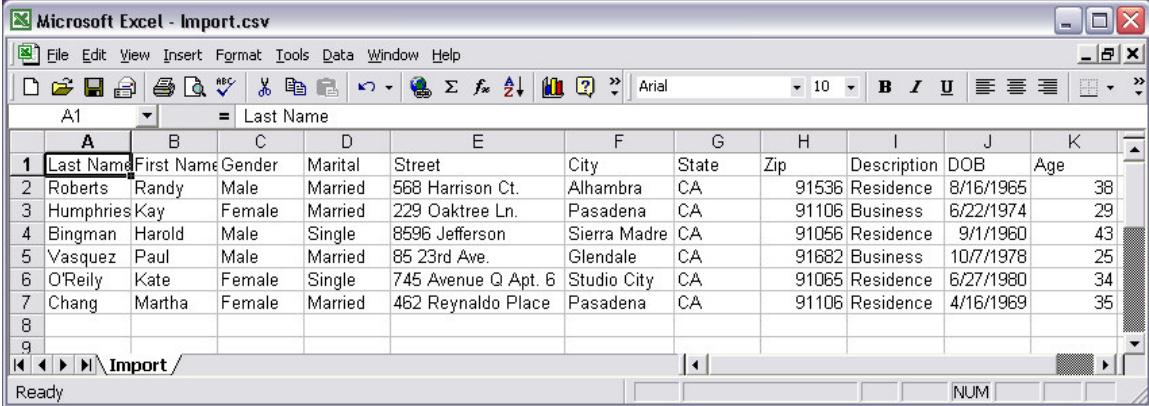

Figure 1: Data organized in Microsoft Excel and saved in .csv format.

Once the data has been organized and saved in .csv format, you can create an import definition to bring the data into the group census of a business record in CDS.

To create an import definition in CDS –
- From the main screen of CDS, click on **Database** in the main menu.
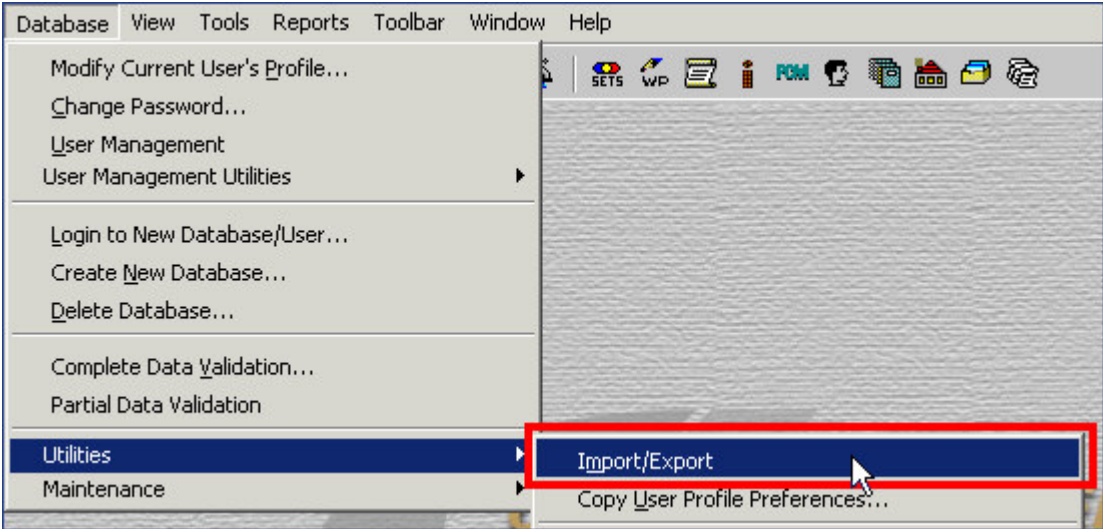- Select **Utilities**.
- Select **Import/Export**.

Figure 2: The Import/Export menu item.

- Click the **Add** button in the **Import/Export Definitions** window.

Figure 3: The Import/Export Definitions window.

- Select the **Comma Separated Value** option in the **Import/Export Selection Type** window.

Figure 4: The Import/Export Selections Type window.

- In the **Table Names** window, select **Contact Information**.
- CDS will display a message regarding phone and address data. When phone or address information is imported, specific fields at the bottom of the **Columns Available** section must be used and data must be organized in the .csv file to match the available phone and address columns.

Figure 5: The phone and address information window.

- Review the information in the phone and address message and then click **OK**.
- The **Import/Export Definition** window will open.
- In the **Import/Export Definition** window, move columns out of the **Columns Available** section into the **Columns Selected** section in accordance with the order of columns in the .CSV file.

Figure 6: .CSV file column organization and corresponding import map in the Import/Export Definition – Contact window.

Moving columns into the **Columns Selected** section creates a map for CDS to follow when importing data. The number preceding a column entry indicates which column in the .csv file CDS will pull data from for the selected column. For example, the first entry in the **Columns Selected** section, **1 – Last Name**, indicates that data in the first column of the .csv file will be entered in the **Last Name** column of the contact record. Note that in this example, the entries in the **Columns Selected** section match the organization of columns in the .CSV file.

Note: Ensure the address and phone information has been properly mapped using the appropriate fields: Phone1-Description1, Phone2-Description2, and so on.

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- When column mapping is completed, click **OK**.
- Give the import definition a name in the **Name** field and click **OK**.

The Import definition has been created. Definitions can be used to import data from multiple files as long as the column organization of a selected file matches the column organization of the .csv file used to create the definition(map).

To import data into CDS using an Import Definition –
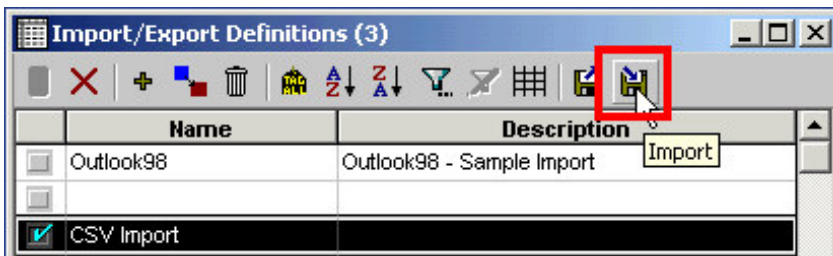- Select an import definition in the **Import/Export Definitions** window and click the **Import** button.

Figure 7: Selected import definition and the Import button in the Import/Export Definition window.

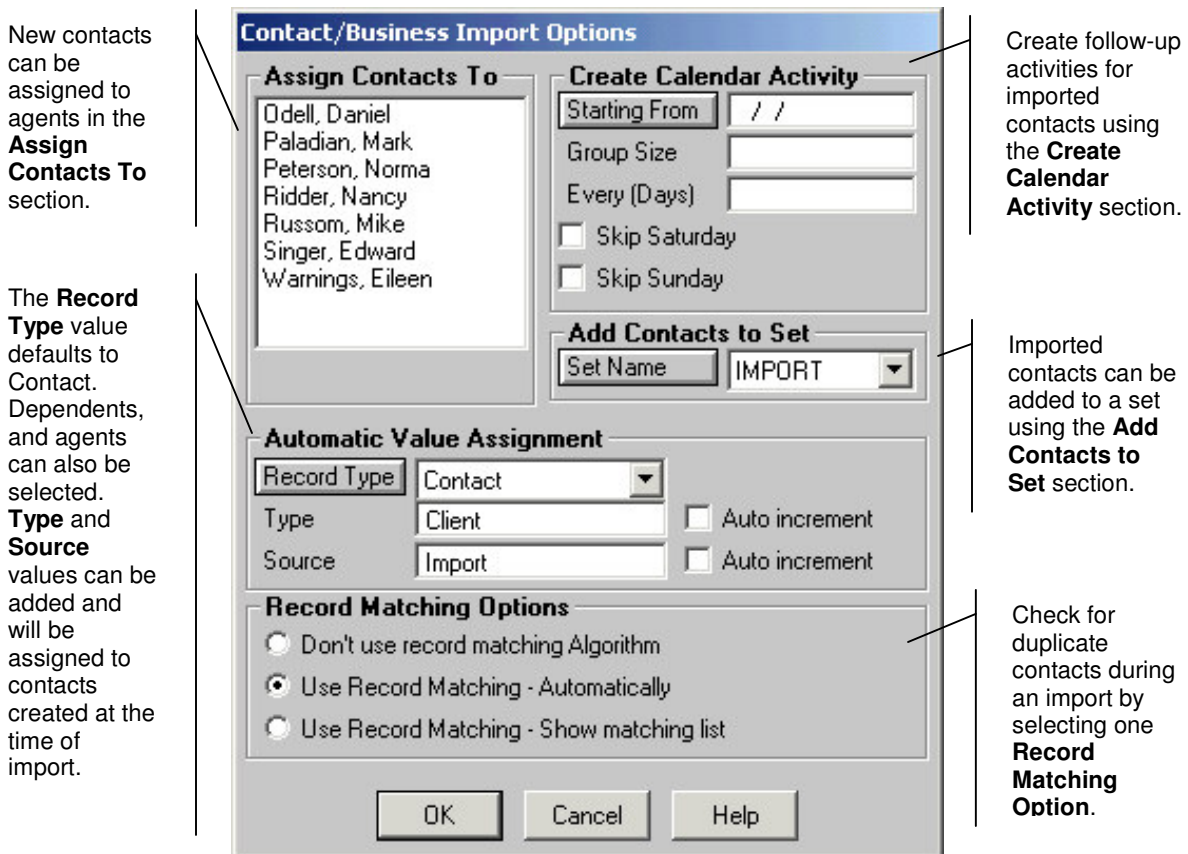- Select import options in the **Contact/Business Import Options** window.

New contacts can be assigned to agents in the **Assign Contacts To** section.

The **Record Type** value defaults to Contact. Dependents, and agents can also be selected. **Type** and **Source** values can be added and will be assigned to contacts created at the time of import.

Create follow-up activities for imported contacts using the **Create Calendar Activity** section.

Imported contacts can be added to a set using the **Add Contacts to Set** section.

Check for duplicate contacts during an import by selecting one **Record Matching Option**.

Figure 8: The Contact/Business Import Options window.

- After selecting import options, click **OK**.
- Find the file with data to be imported in the **Import File Name** window and click **Open**.
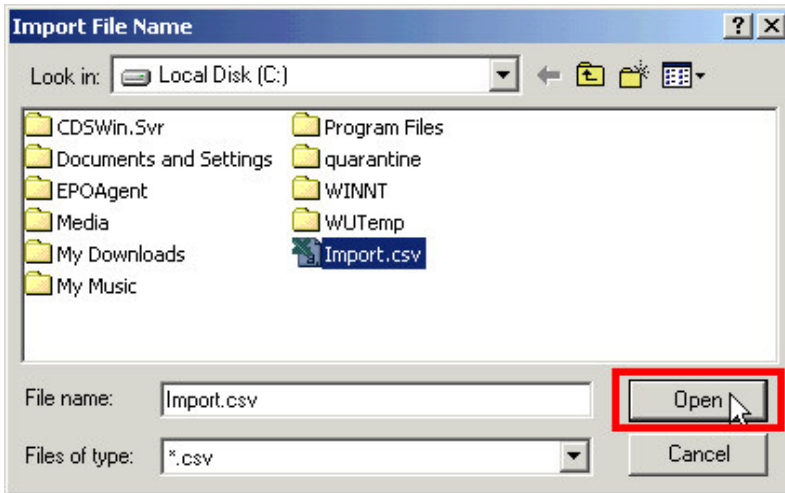

Figure 9: The Import File Name window.

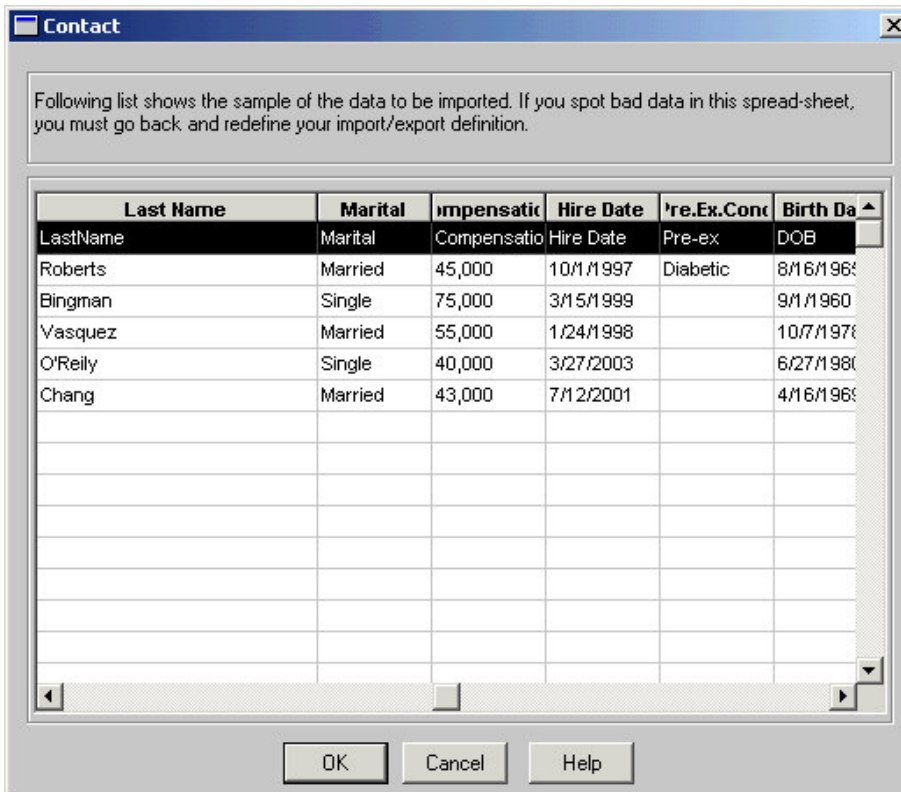- CDS will display a thumbnail view of the import.

Figure 10: The Import File Name window.

- Verify that the import definition has been mapped correctly. If the mapping needs to be redone, click the **Cancel** button and set up the import definition correctly.
- If the mapping is correct, click **OK** to perform the import.

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