Total Contact Management
+ Workflow System

Import Wizard User Guide

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<u>**Import Wizard**</u>

What is the Import Wizard?
The Import Wizard is for importing an existing database into TCM.

How does it work?
Importing data is not a difficult process as long as you follow the instructions carefully. It will save you time in the long run if you read through the instructions before starting the import procedure so your existing data is imported correctly.

Tip: Try to export the data from your existing application as a CSV (comma separated value) file. Having done this, load the CSV file into a spreadsheet and check to see that all data is consistently laid out with the same type of data in the same column. e.g. make sure that each line of the address is consistently in the same columns.

<u>**Import Wizard**</u>

Starting the Import Wizard
To start the Import Wizard either click on the 'Import Wizard' button from the TCM taskbar or, from the TCM menu bar, choose the Import Wizard option from the 'Wizards' menu.

Source Data

The first screen of the Import Wizard is where you select the data file that you wish to import. First select if the file you are going to import is from an application, from a File or from the Windows clipboard.

Importing from application
The TCM importer can import ACT!®2000 for Windows, ACT!®4.0 for Windows and Maximizer® 5.0 for Windows data directly from these applications without the data having to be exported first.

 If you are importing a Maximizer® **5** database select Maximizer® 5 from the '...from Application' drop list. The name of the last database that you viewed in Maximizer® **5** will appear in the box on the right. See page 20 for more information on importing Maximizer® **5** data.

If you are importing a ACT!® database select ACT!® from the '...from Application' drop list and then click on the button showing the folder icon to the right. The browse box will open and you will be in the ACT\Database folder from where you can select the .dbf data file that you want to import into TCM. The .dbf file will have the same name as the name that you gave the database when you created it. See page 15 for more information on importing ACT!® data.
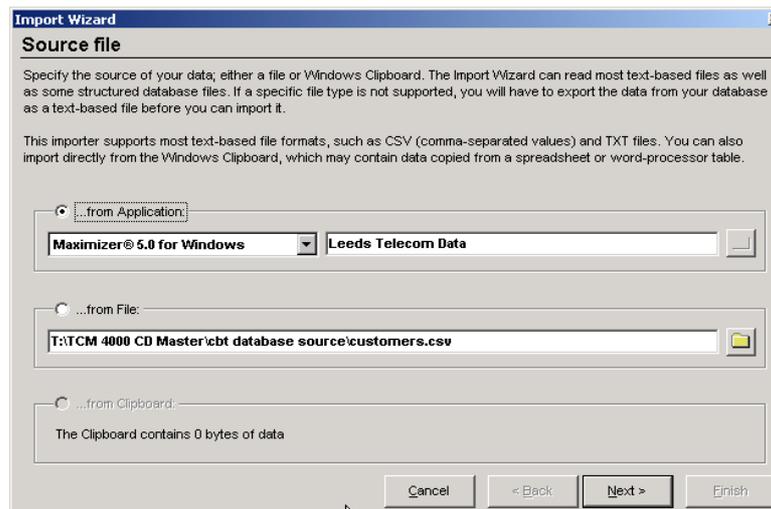
Importing from file

If you have a list of contacts from another application that you want to import into TCM you must first export the data out of the application. You will need to check the documentation for your application to see how to do this. When you export the data from the application you must either export the data as a .csv or .txt file.

Once you have exported the data you will need to check that the exported information is laid out correctly before importing it into TCM. To do this open the exported data file in your spreadsheet program and make sure that the correct data is in the correct column. It is a good idea to give each column a heading so that when you move the data around it goes into the correct column. This process may take some time but if the data is correctly laid out before importing into TCM it will save time later. Once the data is correctly laid out save the file.
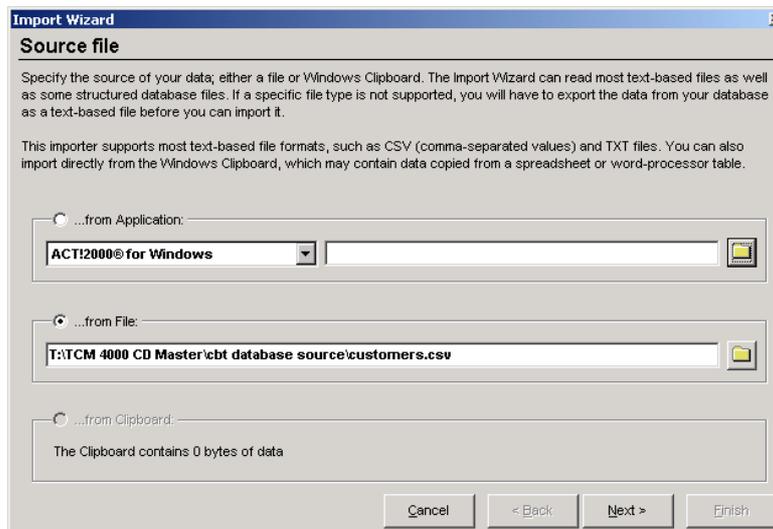

Click on the button showing the folder icon to the right of the '...from File' box and use the 'Source file' browse box to locate the .csv or .txt file that you wish to import. Once located highlight the file and click on 'Open'. The file that you selected to import will appear in the '...from File' box

Importing from clipboard

To import data from the Windows clipboard first open the file that contains the data that you want to import and highlight the contents of the file. Now using the application menu bar copy the data on to the clipboard alternatively press the Ctrl and c keys down together, this will place the highlighted data on the clipboard.

In the Import Wizard select the '...from Clipboard' option you will see text that tells you how much data is stored on the clipboard.
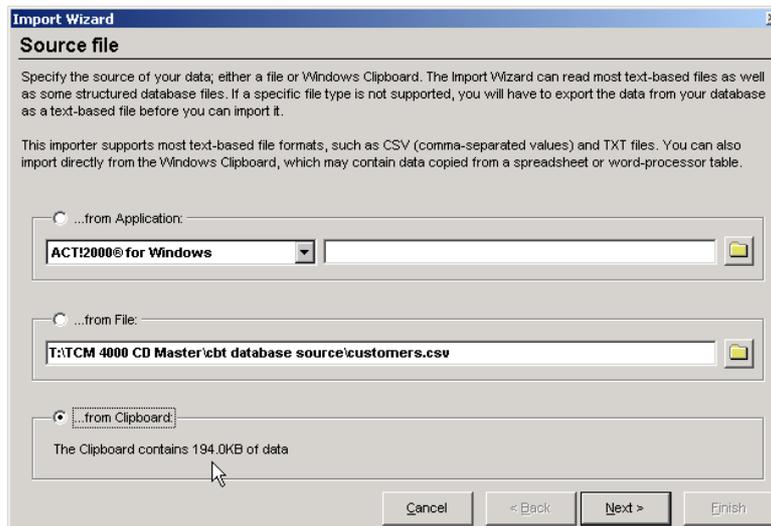
File Layout—Step 1

This screen shows the layout of the data that you are about to import. You can set the amount of data you wish to preview on screen by clicking on the buttons at the side of the 'Preview data size' box.

You must also set the line in your data file that you wish to start importing from. In the example shown the first line of the imported data contains the field names, which you don't want to import into TCM. So the 'Start importing from row' box is set to line 2 so that only the required data is imported into TCM. Clicking on the 'Settings' button gives you access to the advanced settings for the Import Wizard. Click on the 'Next' button to continue.

Settings Options

File Characteristics: If the Import Wizard finds spaces at the beginning or end of a field then it removes them if the 'Remove trailing spaces form fields' option is ticked

Database: If the database that you import has more than one address for the contact then set this to match the maximum number of addresses for any contact.
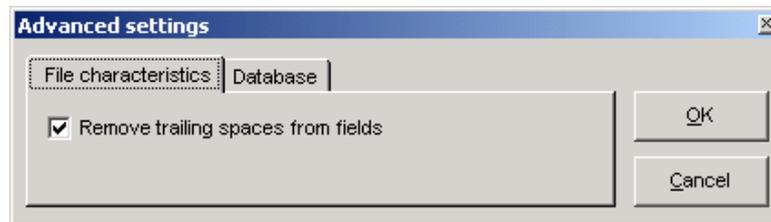
Unless you have good reason to change these options then leave them at the default settings.

File Layout—Step 2

This step of the Import Wizard shows how your data will be imported into TCM. The data should appear in columns (as shown), with each field occupying one column.
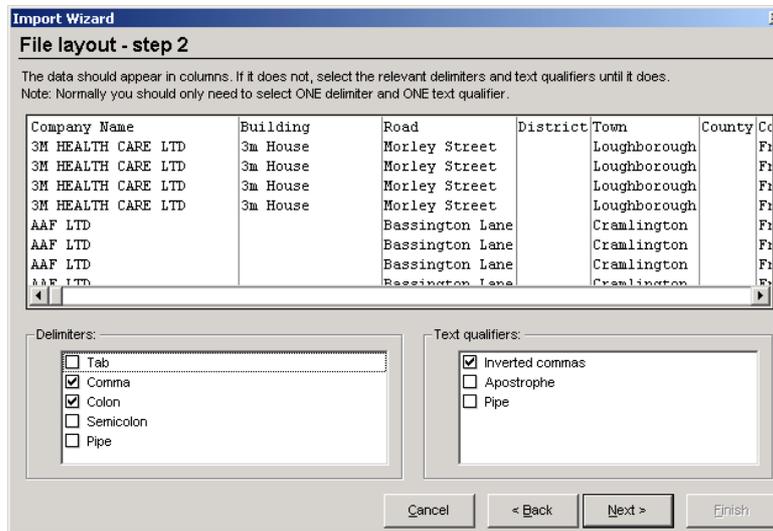
The 'Delimiters' and 'Text Qualifiers' lists at the bottom of the screen are where you can make any corrections to the values which TCM chose automatically.

Before moving on to the next step of the wizard make sure that the data is appearing in separate columns.

Click the 'Next' button to continue.

File Layout—Multi-line fields

Multi—line fields (This screen will only appear if the Import Wizard detects that you are importing data that contains multi-line fields)

Certain applications, such as Microsoft Outlook®, allow multiple lines to be entered into a data field. This can cause inconsistencies when the data is imported into TCM. To overcome this problem the Import Wizard can detect a multi-line field in the data that you are importing and the Import Wizard will suggest that you allow it to split the field into separate fields.

The Import Wizard gives you two options which you can select from to tell the Import wizard what you would like it to do to the Multi-line field data, they are:-

Notes or comments field: Click this option if the field contains general text such as company or contact notes.

Other field / Not sure: Click this option if the field contains an address, phone number or other information which should be split into multiple fields before importing
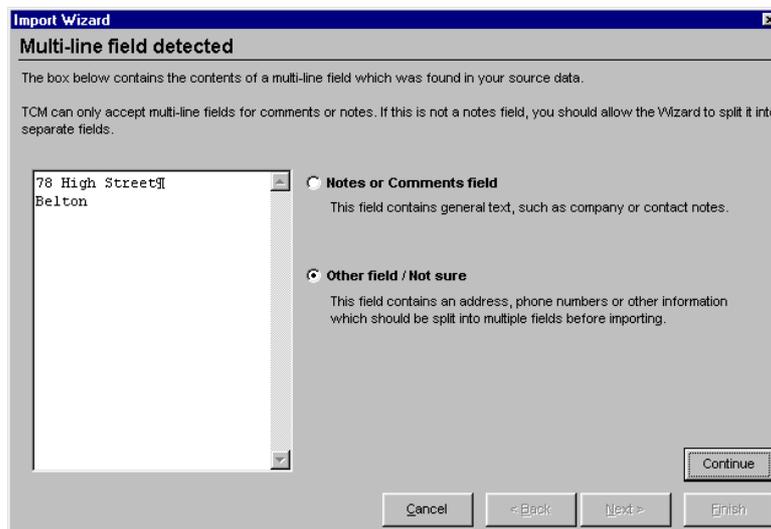
<u>Multi—line fields - continued</u>

Under some circumstances, generally if importing an Microsoft Outlook® file, you will be taken back to the File layout – step 2 screen. Once the Import Wizard has finished this stage of the import procedure it will suggest that you allow the Wizard to create a new file containing your data in which the multi-line field data has been split into various columns. If your old file is called 'Contacts', TCM will have created a new file called 'New Contacts.csv'.

The Import Wizard then prompts you to either [YES] open up the spreadsheet program installed on your system in order to view the data and to alter it as required to ensure that data of the same type is consistently in the same column, or [NO] proceed with the Wizard. If you choose [YES], the Wizard will close down when the new file has been created.
(If you have Microsoft Excel® or other spreadsheet on your hard disk the Wizard will start this application. The Import Wizard does this so that you can edit the new file and make sure that all the data is in the correct fields before importing the file again.)

When you re-start the import procedure (after checking the new data file). The wizard will automatically hold the name of the new file on the opening screen (if you renamed the file when you saved it in your spreadsheet application you will need to change the file name accordingly) on the opening screen. The Import Wizard will now proceed through the previous screens without problem, you should also notice that the data that you are now importing is set out correctly.

Field Allocation

This screen is where you match up the field names from the data you are importing with the TCM fields.
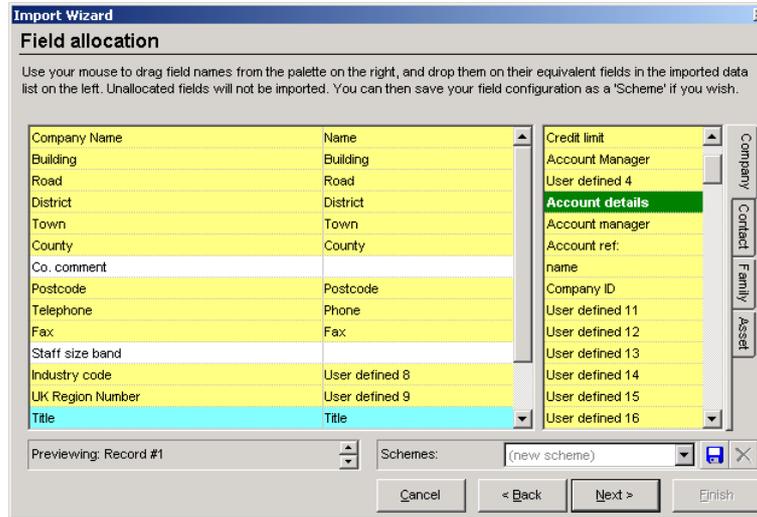
Select the type of TCM field you want to select from by clicking on the tabs on the right hand side of the screen. These are labelled Company, Contact, Family and Asset. Match the TCM fields with the fields from the data you are importing that you can see in the box on the left.

To allocate the fields, drag the relevant field name from the list on the right of the screen to the correct item in the list on the left of the screen. You can check to see if you have allocated the field correctly by moving through the records of the import file by clicking the buttons at the side of the 'Previewing Record #' box.

Fields allocated to yellow field names correspond to TCM Company fields. The blue fields correspond to the Contact fields, Family fields are shown in green and Asset fields in red.

Once you are happy with your field allocation you can give the field allocation a name and save it by clicking on the button showing the blue disk icon. So that the layout can be used again at a later date. Whether you have saved your field allocation or not you can move on by clicking the 'Next' button.

Target Location

The next stage is to tell the Import Wizard where you would like the imported data to be stored. TCM will suggest a folder in which to store the imported data.

You can also choose the style of layout for the folders in which your imported data is going to be stored by clicking on the drop list and choosing from the list of seven options. You will see a small preview of how the folders will look in the window at the bottom right of the Import Wizard screen.

If there are any contacts in your database that are not associated with a company, you can choose to file them alphabetically by either Surname or First name.

Once you have chosen the style for the folders click on the 'Next' button.

In the example shown the folder is called 'Imported' and there is a number in brackets following it. You can change the name of the folder from within TCM once the data is imported or you can change it here. It is important, however, not to delete the number shown in brackets or TCM's electronic filing system will not be able to index the data.

Finishing

The final screen of the Import Wizard is where you choose to import your data into TCM. Click on the 'Start' button and the Import Wizard will start to import your data.

You will see how the import is progressing by a blue progress bar that will appear in this box. The blue progress bar will go across the progress bar box twice, if you have chosen to create a folder structure in the previous step.
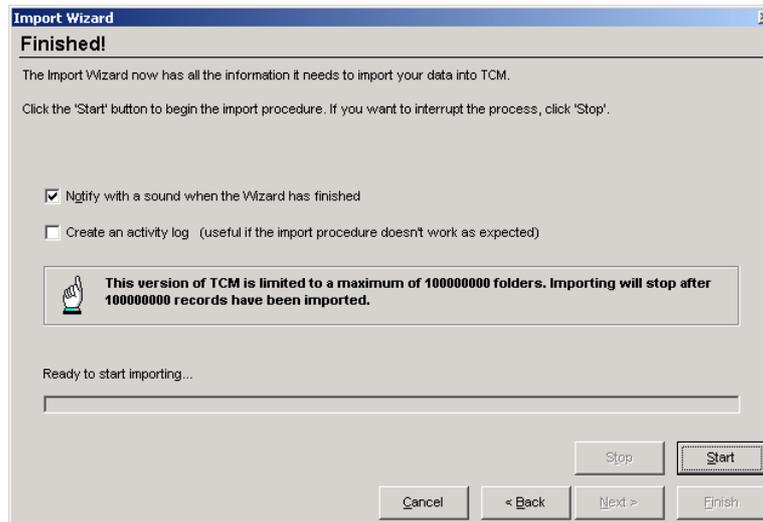
Once the import has finished, the Import Wizard will disappear from screen.

Note: Although the folders will appear in the filing tree in TCM, you will not be able to search for any of the new contacts that you have just imported until you rebuild the TCM indexes.

To rebuild the indexes, log onto TCM as the Administrator and from the 'File' menu select the 'Setup' option. When the 'Setup' screen appears click on the 'Administrative' tab and from the list of options on the left select 'Indexing'. Click on the 'Rebuild' button, when the 'Rebuild indexes' box appears select the indexes that you want to rebuild by putting a tick in the box next to the name of the index that you want to rebuild and then click on the 'Start' button.

Importing ACT!© data

Important: Before starting the import of an ACT! Database you must have a valid installation of ACT! on your computer.

Start the TCM Import wizard from the TCM Taskbar or from the Wizards menu. Click on the radio button to the left of '...from Application' to select it.
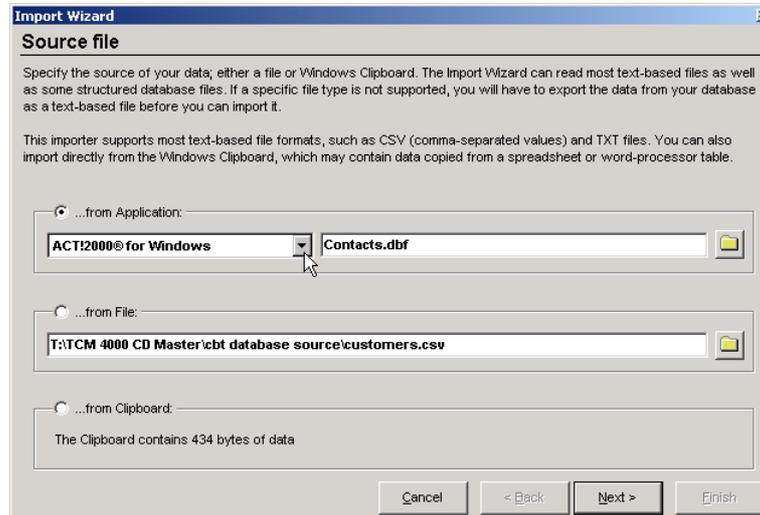
From the drop list below make sure the item selected is 'ACT!® 2000 for Windows' or 'ACT!® 4.0 for Windows'. Now select the ACT! Database that you want to import into TCM, to do this click on the button showing the folder icon. The 'Source file' box will appear, locate the Act database that you want to import and click on the 'Open' button. The file that you import will have the file extension '.dbf'.

The TCM Import will import your ACT! Database directly into TCM, the next screen of the Import Wizard allows you to choose to import one of the Act! Groups or the whole Act! Database. If you don't specify a Group to import the entire Act! Database will be imported.

To import the entire Act! Database make sure that the radio button to the left of 'Import the entire database' is selected. You will also see how many records are going to be imported from the Act! Database. The Import wizard will also create Virtual Folders to mirror the 'Groups' that you have set up within your Act! Database. To have the Import wizard create the virtual folders tick the box to the left of the text that reads 'Create Virtual Folders to mirror the Groups'.

If you only want to import the records from an Act! Database group select the 'Import from this group only' option. To select which group of records to import click on the drop list arrow to see the groups that you can import from, to select the group you want to import single click with the left mouse button on the name of the 'Group' you want to import.
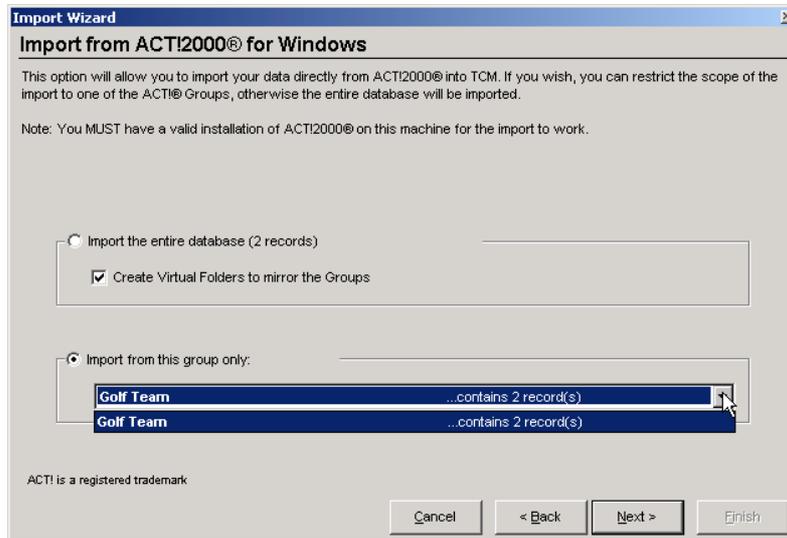
Click on the 'Next' button to continue.

Target location

The 'Target location' screen shows the name of the folder where the Act! Database will be imported into. The default name for the folder is 'Imported' but you can change the name of the folder by highlighting the existing name and type the new name of the folder over the top. The number that you see at the end of the folder name is the TCM filing reference number.

The 'Create sub-folders for your data' option allows you to choose sub-folders so the imported data isn't stored in one big folder. The 'Import' wizard gives you a choice of six sub-folder styles to import your data into. To see how a sub-folder style will look choose a style from the drop down list, a preview of the folder style will appear in the window on the right.
To see a preview of the sub-folder style that you have selected you must select the 'Quick Preview (Show only the first few branches of the structure)' tick box that you will see at the bottom of the 'Target location' screen.

Another option available is the 'File Contact-only records by'. This allows you to choose to either file a contact-only by surname or first name.
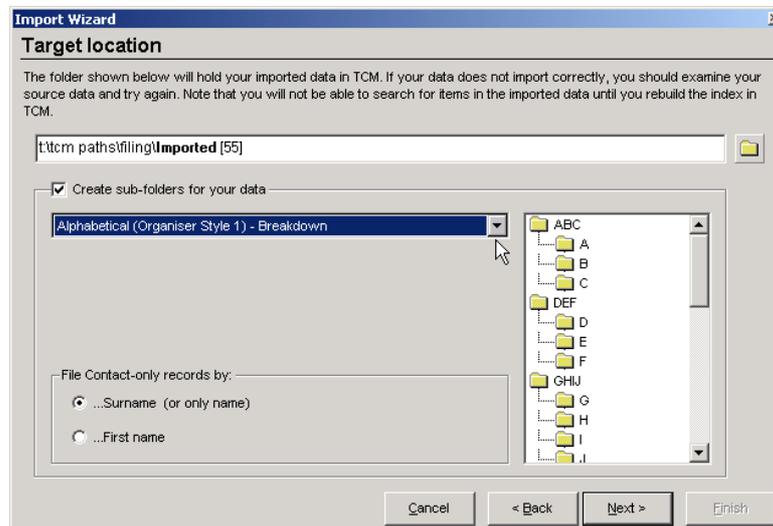

Once you made your selections click on the 'Next' button.

You are now ready to start the import of the Act! Database. Click on the 'Start' button. You will see a progress bar towards the bottom of the screen, this bar shows the progress of the folders that are being created for the imported Act! Data. A second progress bar will appear, this progress bar shows the actual progress of the data being imported into TCM..
Once the import of the Act! Data is complete the TCM Import wizard will close down.

To see the data go to the filing screen in TCM and you will see the folder that the data was imported into. Move through the imported data to make sure it is correct, once you have satisfied yourself that the imported data is correct you will need to index the data.
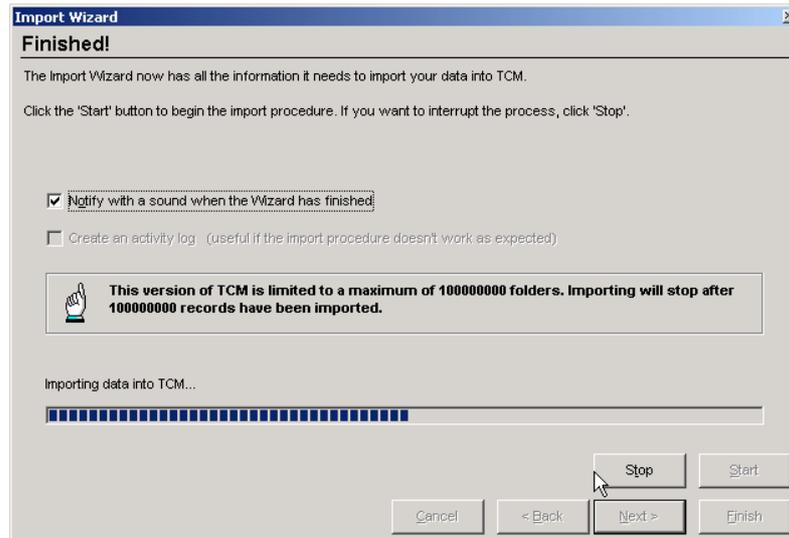
To rebuild the indexes, log onto TCM as the Administrator and from the 'File' menu select the 'Setup' option. When the 'Setup' screen appears click on the 'Administrative' tab and from the list of options on the left select 'Indexing'. Click on the 'Rebuild' button, when the 'Rebuild indexes' box appears select the indexes that you want to rebuild by putting a tick in the box next to the name of the index that you want to rebuild and then click on the 'Start' button.

Importing Maximizer 5 data

**Important**: Before starting the import of a Maximizer 5 Database you must have a valid installation of Maximizer on your computer.

Start the TCM Import wizard from the TCM Taskbar or from the Wizards menu. On the first screen of the TCM Import Wizard click on the radio button to the left of the '...from Application' text to select it.
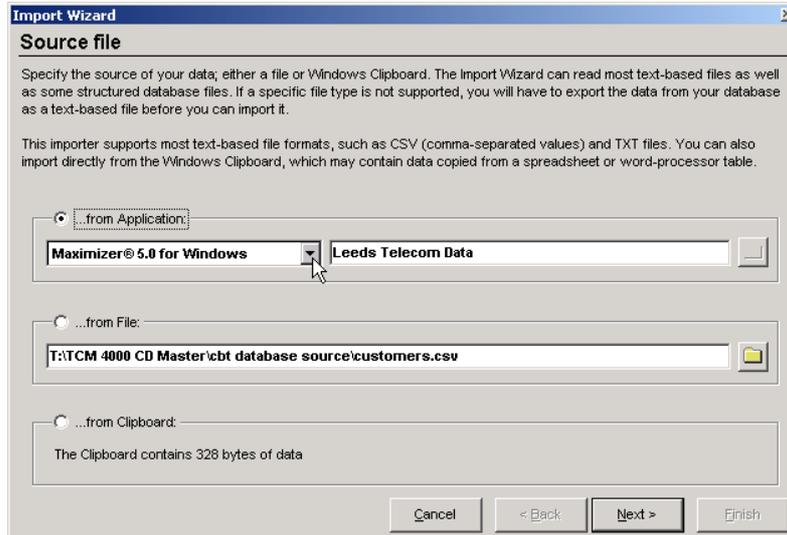
From the drop list below make sure the item selected is 'Maximizer® 5.0 for Windows'. The last database that you viewed in Maximizer will appear in the box to the right. If this is not the database that you want to import into TCM you will need to open Maximizer and open the database that you do want to import into TCM.

The next screen gives information about the import of the Maximizer 5 database. When you have read these instructions click on the 'Next' button to continue.
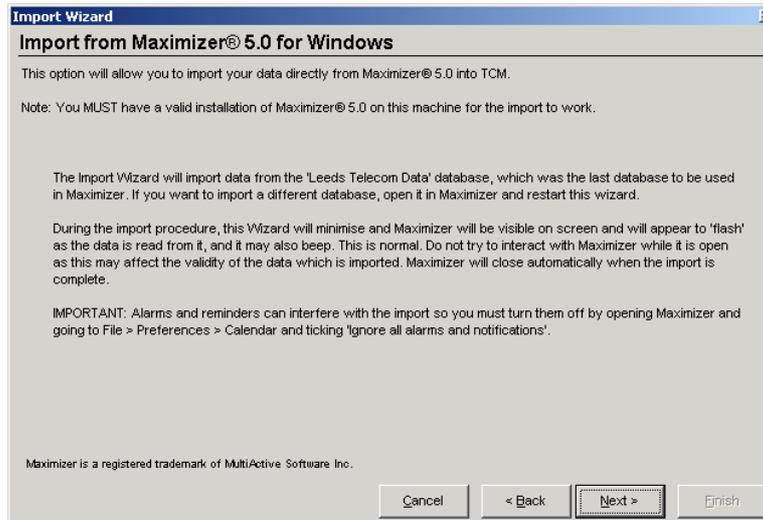
Field Allocation

The TCM Import Wizard will open Maximizer and retrieve the existing fields that you have set up within Maximizer. Once TCM has retrieved the field names from Maximizer you will need to match up the TCM database field names with the Maximizer ones.

Tip: Before importing your Maximizer database we would suggest that you set up the TCM fields first so that matching up of the field names will be easier.
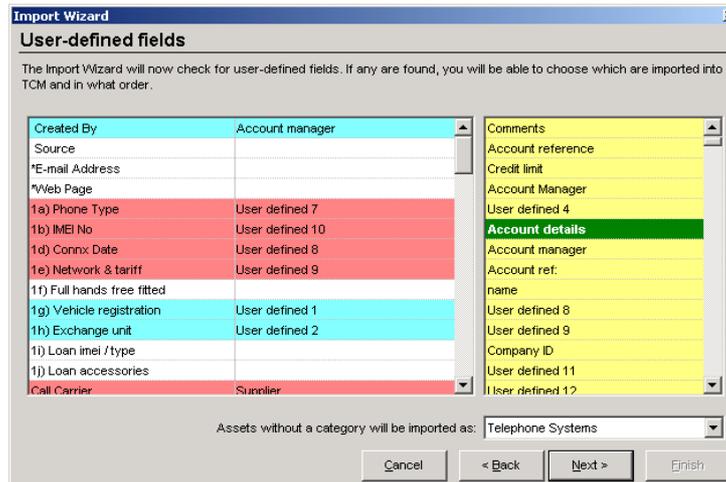
The yellow fields on the right correspond to the company fields in TCM. The blue fields below them correspond to the contact fields and red fields correspond to asset fields. You need to match up the TCM fields (on the right-hand side) with the fields in your database (on the left-hand side).

To allocate the fields, drag the relevant field name from the list on the right of the screen to the correct item in the list on the left of the screen. You can check to see if you have allocated the field correctly by moving through the records of the import file by clicking the buttons at the side of the 'Previewing Record #' box.

Whether you have saved your field allocation or not you can move on by clicking the 'Next' button.

Target Location

The next stage is to tell the Import Wizard where you would like the imported data to be stored. TCM will suggest a folder in which to store the imported data.

You can also choose the style of layout for the folders in which your imported data is going to be stored by clicking on the drop list and choosing from the list of seven options. You will see a small preview of how the folders will look in the window at the bottom right of the Import Wizard screen. If there are any contacts in your database that are not associated with a company, you can choose to file them alphabetically by either Surname or First name. Once you have chosen the style for the folders click on the 'Next' button.

The TCM Import Wizard will open Maximizer and start importing the information from your Maximizer database into TCM. Once the data has been imported you will need to rebuild the indexes.

To rebuild the indexes, log onto TCM as the Administrator and from the 'File' menu select the 'Setup' option. When the 'Setup' screen appears click on the 'Administrative' tab and from the list of options on the left select 'Indexing'. Click on the 'Rebuild' button, when the 'Rebuild indexes' box appears select the indexes that you want to rebuild by putting a tick in the box next to the name of the index that you want to rebuild and then click on the 'Start' button.

<u>Glossary</u>

Field Name - Part of a Company/Contacts details such as Road Name, Town, Job Title, etc.

Delimiter – Many data files have symbols which separate each field, a common delimiter symbol is a comma.

Text Qualifier – A symbol which identifies an item of text.

Clipboard - A pad which allows you to temporarily store data before importing or pasting the data into the same or other application.

Click & Drag - A process of single clicking on an item, such as a field name with the left mouse button, and while the button is depressed, dragging the item to another location by moving the mouse.

Target Location - A folder on your hard disk where the new imported data folders will be created.