Data Importer CSV File Setup

Table of Contents

Introduction

The Data Importer tool allows you to add an entire batch of data (contacts, loans, users, products, or recruiting data) to the Total Expert (TE) platform in a single bulk action. This means you can bring data from another system into your TE account—or if you are an administrator, on behalf of other users in your organization.

Before you can import data into TE, you must first set up the data file to be imported. This document only covers requirements and setup instructions for the import file; see *Using the Data Importer* for instructions on importing the data into the platform.

Import File Requirements

Regardless of whether you are importing contacts, loans, or other data, the import file must satisfy the following constraints:

- The data to be imported must be stored in a comma-separated variable (CSV) file.
    - Use the CSV UTF-8 Encoding file type in Excel for best results processing special characters.
- The first row of the CSV file must consist of column headers, which are used to map to TE fields.

When an import file contains multiple records with the same identifying data, those records will be merged into a single record. A record whose identifying data matches an existing contact or loan in TE will update the existing record with the data in the import file, including overwriting data in the existing record, with the following exceptions:

- Any groups specified in the import file will be added to the existing list of groups for the contact. The contact is not removed from any existing groups, even if they are not included in the import file.
    - Groups that do not already exist are created as non-editable groups.
- If there is a conflict in the Source field for a contact, the existing value will be retained.
    - If the existing value is blank, the value from the import file is written to the contact record.
    - Sources that do not already exist are created.
- If there are any blank fields in the import file, they are ignored and the existing values for those fields are retained.

When a single import file contains records that will be distributed to multiple users, an additional column is required. This column must contain the information needed to determine which user each record will be created for. This user column must contain either an email address in every row or an external ID number (as determined from an external data source) in every row—and not a combination of email addresses and ID numbers. As each record is imported, it will be assigned to the user indictated. (If importing records for only a single user, this column is not required.)

Note
If using email addresses to identify users, the addresses must exactly match the addresses associated with the intended users' TE accounts.

Minimum Information for Contact Imports

When importing a list of contacts, each record must have at least the following data to be considered complete:

- first name
- last name (must be in a separate column of the CSV file from first name)
- at least one of:
  - email address
  - phone number (home, cell, or office number)
  - physical address (must include street address, city, state, and ZIP code in separate columns)

Note
The state must be given as the 2-letter postal abbreviation, such as `MN` for Minnesota.

Minimum Information for Lead Imports

When importing a list of leads, each record must have at least the following data to be considered complete:

- first name
- last name (must be in a separate column of the CSV file from first name)
- at least one of:
  - email address
  - phone number (home, cell, or office number)
  - physical address (must include street address, city, state, and ZIP code in separate columns)
- lead source

Note
The state must be given as the 2-letter postal abbreviation, such as `MN` for Minnesota.

Minimum Information for Loan Imports

When importing a list of loans, each record must have at least the following data to be considered complete:

- loan number
- borrower's first name
- borrower's last name (must be in a separate column of the CSV file from first name)
- at least one of:
  - borrower's email address
  - borrower's phone number (home, cell, or office number)
  - borrower's physical address (must include street address, city, state, and ZIP code in separate columns)

Minimum Information for Product Imports

Tip
Import contacts before importing products so they can be tied together with an external ID to represent the account number of the contact.

When importing a list of products, each record must have at least the following data to be considered complete:

- external ID
- account number

Minimum Information for Recruiting Imports

When importing a list of recruiting information, each record must have enough information to create a contact record (which will identify an existing contact if one exists and update its information).

Minimum Information for User Imports

When importing a list of users, each record must have at least the following data to be considered complete:

- email address
- role name
- user type name (The `user-types.name` field must be set to `Lender`.)

Minimum Information for Co-Marketing Partner Imports

When importing a list of co-marketing partners, each record must have at least the following data to be considered complete:

- email address
- agent user type ID

Duplicate Checking

Contacts or loans in the CSV file that do not already exist in the target user's database will be created as new records. If no creation date is specified, the date of the import will be written to this field.

If a record in a contact import exactly matches the full name and at least one part of the contact information for an existing record, it will be considered a duplicate of the existing record. In this case, a new record will not be created, and the existing record will be updated with any data in the imported file as specified above. Blank fields in the import file will *not* overwrite fields that contain existing data.

Setup Instructions

General

1. Collect the data you want to import into a single file in Microsoft Excel (or other program that can save data as a CSV file).
    a. You might do this by exporting the list from another system or by manual entry from other sources.

Note
The importer is limited to files of no more than 50 MB. If you have more records to import, break them into multiple files and import each separately.

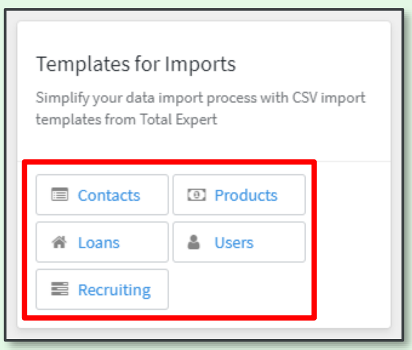
2. Ensure that the first row in the file consists of column headers. You have 2 options for setting up these headers:
    a. Use header names exactly as given in the verified template files; these names are listed in the Column Header Names section below. This allows you to map the headers to TE fields while running the import by simply clicking the Apply Defaults button.
    b. Use any header names that are sufficiently descriptive that they can be easily identified. This will require a manual selection to map each header to a corresponding TE field while running the import.

Tip

TE recommends using the first option. It may require more work at this stage if you are working from a file exported from another platform, but it makes mapping fields during the import a one-click step. You can then use the resulting file as a template for future imports.

The data templates are available to download from the import list page. Navigate to **Import Data**, then in the Templates for Imports section on the right, click the button for the desired data type. You can use these files directly or copy the headers and paste them into your existing file.

Templates are shown for only for the types of data the current user has permission to import.



3. Save the file in CSV format.

The file is now ready to import. See *Using the Data Importer* for instructions on running the import in the platform.

If you are having difficulty with the setup or import, please contact Total Expert Customer Support.

Headshot Links in the Import File

To include links to headshot images in an import file, you must modify an organization setting (this is a one-time general setup step), then configure the information in each import file.

Organization Setting

Your organization's super admin user must update an organization setting.

1. Navigate to **Organization Admin → Organization Settings**.
2. Search for `user.profile_img_host`.

3. Modify the setting so the custom value is the domain of the site where the headshot images are stored. For example, if you are using Dropbox, enter `dropbox.com`.

Once this change is saved, it will apply to all future import jobs.

Import File

Ensure the link for each image points to the image file itself, and not a page that displays it.

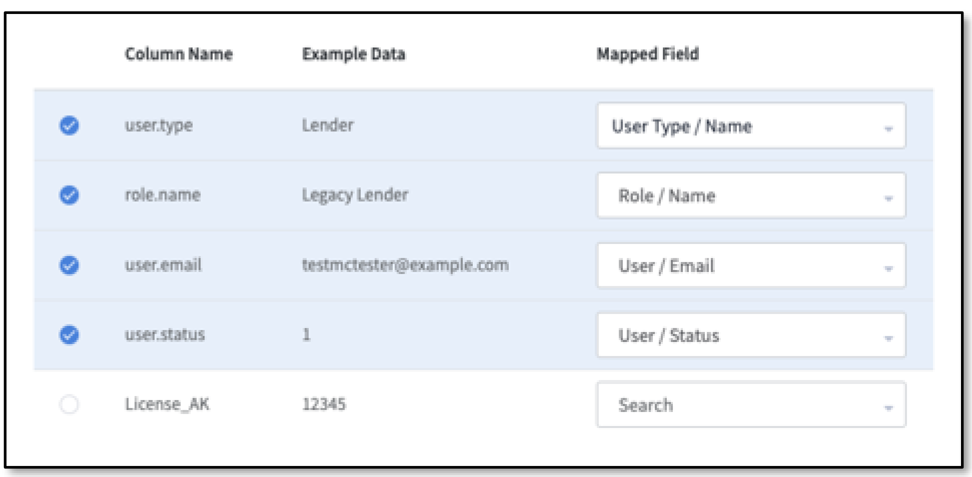
Example
If using Dropbox, and the link ends with `?dl=0` (as in `https://www.dropbox.com/s/82eiqupt55f58ph/622.%20Encino_Albert_Pro-Headshot.png?dl=0`), then replace this with `?raw=1` (as in `https://www.dropbox.com/s/82eiqupt55f58ph/622.%20Encino_Albert_Pro-Headshot.png?raw=1`).

Additional Setup Tips

Ensure there are no hidden columns or rows in the import file.

Custom fields can be included in the import file. Your organization's custom fields are listed and can be selected during the field mapping step of the import.

The file to be imported can include a column for state licensing numbers. While there is nothing to match in the field mapping step, a column header of `License_XX` (where `XX` is the 2-letter postal code for the state) will import correctly. For example, the column header `License_AK` can be imported with values for license numbers in Alaska. The image below shows how this would appear in the importer during mapping.



	Column Name	Example Data	Mapped Field
✓	user.type	Lender	User Type / Name
✓	role.name	Legacy Lender	Role / Name
✓	user.email	testmctester@example.com	User / Email
✓	user.status	1	User / Status
	License_AK	12345	Search

Finally, ensure that the data in your import file is correct before beginning the import. Once an import job has been started, it cannot be cancelled or reversed.

Column Header Names

Use the tables below to locate the appropriate header names in the provided templates to include in your CSV file so the columns will map to the correct TE fields when you run the import.

Required fields are highlighted. Fields that are always required for a successful import are highlighted in bright yellow. Fields that are conditionally required are highlighted in pale gold (for example, in a contact import, an email address *or* a cell phone number is required, but not both). See Import File Requirements above.

Note
In general, any field in a contact or loan record could be included, though not all are listed in the templates. For example, a contact's fax number could be imported using the header `contact.fax`. Any loan participant could include any field in a contact record, such as `borrower.fax` or `coborrower-contact-note.notes`. If a field header in your CSV file does not map automatically when you apply the defaults, you can still select the corresponding field from the drop-down list in the importer.

For most fields, whatever data you provide in each field will be imported as-is; the importer does not validate the contents of these fields. In some cases, as noted below, certain values or formats are expected. In these cases, "bad" data will be treated as described.

Ensure that all the dates in a single CSV file are formatted the same way. The import process includes a step to select the date format the importer should look for; any data formatted any other way will not be interpreted as a date and will not be imported. This applies to data imports of all types.

Ensure that the data is accurate, formatted as expected, and given the correct headers before using the Data Importer.

User-Identifying Headers for Multiple-User Imports

When setting up your CSV file to import records to multiple users, you must include a column that identifies which user's account each record should be imported to. These headers are not included in the templates, so you would have to add the column manually. If you are uploading contacts or leads:

- If the user the record applies to is identified by email address, use the column header `user.email`.
- If the user the record applies to is identified by external ID, use the column header `user.external_id`.

Note
A single CSV file should only include one or the other of these, not both.

Similarly, if you are importing loans, use `loan_officer.email` or `loan_officer.external_id` to identify which Total Expert user is the owner of each loan record.

If all the records of a CSV file will be assigned to the same user, this information should be omitted.

Headers for Contact Records

For the most part, the field names given in the contacts template are self-explanatory. Notes are given below where the purpose of a field or formatting of the data you provide warrants some explanation. If a record in the CSV file does not include enough information to create a new contact record in TE, that record will be skipped.

Contact Template Field Name	Notes
contact-group.name	List of groups the contact should belong to in TE. If a group name does not already exist, it will be created. Add multiple groups by separating the names with commas (and no spaces—a space will be treated as part of the text of a group name). For example: `clients,in process`.
contact-note.notes	Text to be saved as a general note on the contact record. All the text in this field is added to a single note.
contact.external_id	
contact.title	For example, `Mr.`, `Mrs.`, or `Captain`.
contact.first_name	
contact.last_name	
contact.suffix	For example, `Sr.`, `Jr.`, or `III`.
contact.email	The contact's primary email address.
contact.email_work	A secondary email address. This will be used when sending a message from TE if the primary address is blank.
contact.ok_to_email	A value that determines whether the system will allow or suppress emails to this contact. A value of `yes` or `1` here will allow emails to be sent. Any other value (including blank) will be interpreted as opted out.
contact.address	
contact.address_2	
contact.city	
contact.state	Use the 2-character postal code. If anything else is provided, such as full state names, the field will be left blank in TE.
contact.zip	
contact.ok_to_mail	A value that determines whether the system will allow or suppress physical mail to this contact. A value of `yes` or `1` here will allow mail to be sent. Any other value (including blank) will be interpreted as opted out.
contact.phone_cell	If the format is anything other than `(###) ###-####`, the text will be imported as-is, but will be flagged as incorrectly formatted on the contact details page.
contact.phone_office	If the format is anything other than `(###) ###-####`, the text will be imported as-is, but will be flagged as incorrectly formatted on the contact details page.
contact.phone_home	If the format is anything other than `(###) ###-####`, the text will be imported as-is, but will be flagged as incorrectly formatted on the contact details page.
contact.ok_to_call	A value that determines whether the system will allow or suppress calls to this contact. A value of `yes` or `1` here will allow calls to be made. Any other value (including blank) will be interpreted as opted out.
contact.employer	
contact.employer_address	
contact.employer_address_2	

Contact Template Field Name	Notes
contact.employer_city	
contact.employer_state	
contact.employer_zip	
contact.employer_license_number	
contact.license_number	
contact.lead_source	Text indicating the way the contact was discovered. If a source name does not already exist, it will be created.
contact.creation_date	The date the record was created. If blank or incorrectly formatted, the date the import is performed will be written to this field in TE.
contact.last_modified_date	The date the record was most recently changed. If blank or incorrectly formatted, the field will be left blank in TE.
contact.birthday	The contact's date of birth. If blank or incorrectly formatted, the field will be left blank in TE. Depending on your organization's setup, the year may be suppressed.
contact.last_contacted_date	The date the contact was most recently contacted (by any means). If blank or incorrectly formatted, the field will be left blank in TE.
contact.referred_to	The name of the person to whom this contact has been referred.
contact.referred_by	The name of the person who referred this contact to you.
contact.list_date	The date the contact's property was listed. If blank or incorrectly formatted, the field will be left blank in TE.
contact.close_date	The date the contact's loan was closed. If blank or incorrectly formatted, the field will be left blank in TE.
contact.credit_score	Valid values are `Excellent`, `Good`, `Fair`, `Poor`, and `Very Poor`. If anything else is provided, such as numeric values, the field will be left blank in TE.
contact.credit_score_date	The date the contact's credit score was checked. If blank or incorrectly formatted, the field will be left blank in TE.
contact.credit_score_expiration_date	The date the contact's current credit score expires. If blank or incorrectly formatted, the field will be left blank in TE.

Headers for Lead Records

Many of the field names given in the leads template are anaologous to those in the contacts template, while quite a few others are specific to the opportunity represented by the lead. Remember that more than 1 lead can correspond to a single contact. Notes are given below where the purpose of a field or formatting of the data you provide warrants some explanation. If a record in the CSV file does not include enough information to create a new lead record in TE, that record will be skipped.

Lead Template Field Name	Notes
lead-group.name	List of groups the lead should belong to in TE. If a group name does not already exist, it will be created. Add multiple groups by separating the names with commas (and no spaces—a space will be treated as part of the text of a group name). For example: `clients,in process`.
lead.external_id	
lead.title	For example, `Mr.`, `Mrs.`, or `Captain`.
lead.first_name	
lead.last_name	
lead.suffix	For example, `Sr.`, `Jr.`, or `III`.
lead.email	The lead's primary email address.
lead.email_work	A secondary email address. This will be used when sending a message from TE if the primary address is blank.
lead.ok_to_email	A value that determines whether the system will allow or suppress emails to this lead. A value of `yes` or `1` here will allow emails to be sent. Any other value (including blank) will be interpreted as opted out.
lead.address	
lead.address_2	
lead.city	
lead.state	Use the 2-character postal code. If anything else is provided, such as full state names, the field will be left blank in TE.
lead.zip	
lead.ok_to_mail	A value that determines whether the system will allow or suppress physical mail to this lead. A value of `yes` or `1` here will allow mail to be sent. Any other value (including blank) will be interpreted as opted out.
lead.phone_cell	If the format is anything other than `(###) ###-####`, the text will be imported as-is, but will be flagged as incorrectly formatted on the lead details page.
lead.phone_office	If the format is anything other than `(###) ###-####`, the text will be imported as-is, but will be flagged as incorrectly formatted on the lead details page.
lead.phone_home	If the format is anything other than `(###) ###-####`, the text will be imported as-is, but will be flagged as incorrectly formatted on the lead details page.
lead.ok_to_call	A value that determines whether the system will allow or suppress calls to this lead. A value of `yes` or `1` here will allow calls to be made. Any other value (including blank) will be interpreted as opted out.

Lead Template Field Name	Notes
lead.lead_source	Text indicating the way the lead was discovered. If a source name does not already exist, it will be created.
lead.creation_date	The date the record was created. If blank or incorrectly formatted, the date the import is performed will be written to this field in TE.
lead.last_modified_date	The date the record was most recently changed. If blank or incorrectly formatted, the field will be left blank in TE.
lead.birthday	The lead's date of birth. If blank or incorrectly formatted, the field will be left blank in TE. Depending on your organization's setup, the year may be suppressed.
lead.last_contacted_date	The date the lead was most recently contacted (by any means). If blank or incorrectly formatted, the field will be left blank in TE.
lead.referred_to	The name of the person to whom this lead has been referred.
lead.referred_by	The name of the person who referred this lead to you.
lead.credit_score	Valid values are `Excellent`, `Good`, `Fair`, `Poor`, and `Very Poor`. If anything else is provided, such as numeric values, the field will be left blank in TE.
lead.credit_score_date	The date the lead's credit score was checked. If blank or incorrectly formatted, the field will be left blank in TE.
loan.loan_number	
loan-type.type	
lead-opportunity.property_value	
lead-opportunity.property_county	
lead-opportunity.property_zip	
lead-opportunity.property_state	
lead-opportunity.property_msa	
lead-opportunity.loan_amount	
lead-opportunity.loan_down_payment	
lead-opportunity.loan_cash_out	
lead-opportunity.property_type	
lead-opportunity.property_use	
lead-opportunity.loan_request_type	
lead-opportunity.source	
lead-opportunity.lead_price	
lead-opportunity.tracking_number	
lead-opportunity.annual_income	
lead-opportunity.first_time_buyer	
lead-opportunity.has_agent	

TOTAL EXPERT

Lead Template Field Name	Notes
lead-opportunity.contact_phone_extension	
lead-opportunity.consumer_geo_phone_area_code	
lead-opportunity.is_military	
lead-opportunity.assigned_credit_value	
lead-opportunity.self_credit_rating	
lead-opportunity.bankruptcy	
lead-opportunity.foreclosure	
lead-opportunity.working_with_agent	
lead-opportunity.found_home	
lead-opportunity.property_purchase_price	
lead-opportunity.is_fha_eligible	
lead-opportunity.is_va_loan	
lead-opportunity.present_ltv	
lead-opportunity.proposed_ltv	
lead-opportunity.term	
lead-opportunity.estimated_payment	
lead-opportunity.apr	
lead-opportunity.market_value	
lead-opportunity.order_id	
lead-opportunity.rate_offer	
lead-opportunity.discount	

Headers for Loan Records

For the most part, the field names given in the loans template are self-explanatory. Notes are given below where the purpose of a field or formatting of the data you provide warrants some explanation. The loan fields below are broken into multiple sections to help you locate different types of fields.

Loan-Related Headers

These headers refer to information about the loan itself. The loan number is required information for an import. If a record in the CSV file does not include this, that record will be skipped.

Loan Template Field Name	Description
referring-loan-officer.external_id	
loan-status.status	The current status of the loan, such as `New` or `Clear to Close`. If a status name does not already exist, it will be created.
loan-program.program	The program of the loan, such as `15-Year Fixed` or `10-Year ARM`. If a program name does not already exist, it will be created.

Loan Template Field Name	Description
loan-type.type	The type of the loan, such as `Conventional` or `VA`. If a type name does not already exist, it will be created.
loan-purpose.purpose	The purpose of the loan, such as `Purchase` or `Refinance`. If a purpose name does not already exist, it will be created.
account-classification.type	
account-classification.system_name	
loan.external_id	
loan.address	
loan.address_2	
loan.city	
loan.state	
loan.zip	Value must be numeric.
loan.county	
loan.estimated_value	
loan.appraised_value	
loan.purchase_price	
loan.amount	
loan.rate	The percentage rate of the loan. The number provided will be rounded to the nearest .001%. For example, entering 1.0046 will be interpreted as 1.005%.
loan.term	Number of months for the borrower to pay back the loan. If a non-integer is entered, the value will be rounded to the nearest integer.
loan.loan_name	
loan.loan_number	
loan.application_number	
loan.application_date	
loan.application_sent_date	
loan.application_received_date	
loan.is_first_time_buyer	A value of `yes` or `1` here indicates the borrower is a first-time home buyer. Any other value will be interpreted as `no`.
loan.property_type	
loan.pre_approval_issued	A value of `yes` or `1` here indicates the borrower was issued a pre-approval. Any other value will be interpreted as `no`.
loan.pre_approval_issued_date	
loan.pre_approval_expiration_date	
loan.approval_date	
loan.loan_to_value_combined	
loan.occupancy_type	

Loan Template Field Name	Description
loan.escrow_waived	A value of `yes` or `1` here indicates that escrow was waived. Any other value will be interpreted as `no`.
loan.lock_status	
loan.lock_date	
loan.lock_expiration_date	
loan.appraisal_expected_date	
loan.appraisal_ordered_date	
loan.appraisal_received_date	
loan.created_date	
loan.ctc_date	
loan.closing_date	
loan.documents_signed_date	
loan.epo_date	
loan.first_payment_date	
loan.funded_date	
loan.loan_arm_expiration_date	
loan.processing_start_date	
loan.underwriting_submission_date	
loan.underwriting_approval_date	
loan.annual_review_date	
loan.last_modified_date	
loan.referral_source	
loan.loan_to_value	
loan.processing_start_date_estimated	
loan.underwriting_start_date_estimated	
loan.underwriting_approval_date_estimated	
loan.approval_date_estimated	
loan.closing_date_estimated	
loan.resubmittal_date	
loan.docs_out_date	

Borrower-Related Headers

The following loan headers relate specifically to the primary borrower. The borrower's first name, last name, and one distinct type of contact information are required information for the loan record import to succeed. If the borrower's information does not match an existing contact record in the target user's list, a new contact record will be created. If insufficient information is provided (for example, just first and last name), no contact will be created, and the loan record import will be skipped.

Loan Template Field Name	Description
borrower-contact-note.notes	Text to be saved as a general note on the contact record. All the text in this field is added to a single note.
borrower-contact-group.name	List of groups the contact should belong to in TE. If a group name does not already exist, it will be created. Add multiple groups by separating the names with commas (and no spaces). For example: `clients,in process`.
borrower.external_id	
borrower.title	For example, `Mr.`, `Mrs.`, or `Captain`.
borrower.first_name	
borrower.last_name	
borrower.suffix	For example, `Sr.`, `Jr.`, or `III`.
borrower.email	The contact's primary email address.
borrower.email_work	A secondary email address. This will be used when sending a message from TE if the primary address is blank.
borrower.ok_to_email	A value that determines whether the system will allow or suppress emails to this contact. A value of `yes` or `1` here will allow emails to be sent. Any other value (including blank) will be interpreted as opted out.
borrower.address	
borrower.address_2	
borrower.city	
borrower.state	
borrower.zip	
borrower.ok_to_mail	A value that determines whether the system will allow or suppress physical mail to this contact. A value of `yes` or `1` here will allow mail to be sent. Any other value (including blank) will be interpreted as opted out.
borrower.phone_cell	If the format is anything other than `(###) ###-####`, the text will be imported as-is, but will be flagged as incorrectly formatted on the contact details page.
borrower.phone_office	If the format is anything other than `(###) ###-####`, the text will be imported as-is, but will be flagged as incorrectly formatted on the contact details page.
borrower.phone_home	If the format is anything other than `(###) ###-####`, the text will be imported as-is, but will be flagged as incorrectly formatted on the contact details page.
borrower.ok_to_call	A value that determines whether the system will allow or suppress calls to this contact. A value of `yes` or `1` here will allow calls to be made. Any other value (including blank) will be interpreted as opted out.
borrower.employer	
borrower.employer_address	

Loan Template Field Name	Description
borrower.employer_address_2	
borrower.employer_city	
borrower.employer_state	
borrower.employer_zip	
borrower.lead_source	Text indicating the way the contact was discovered. If a source name does not already exist, it will be created.
borrower.creation_date	The date the record was created. If blank or incorrectly formatted, the date the import is performed will be written to this field in TE.
borrower.last_modified_date	The date the record was most recently changed. If blank or incorrectly formatted, the field will be left blank in TE.
borrower.birthday	The contact's date of birth. If blank or incorrectly formatted, the field will be left blank in TE. Depending on your organization's setup, the year may be suppressed.
borrower.last_contacted_date	The date the contact was most recently contacted (by any means). If blank or incorrectly formatted, the field will be left blank in TE.
borrower.referred_to	The name of the person to whom this contact has been referred.
borrower.referred_by	The name of the person who referred this contact to you.
borrower.credit_score	Valid values are `Excellent`, `Good`, `Fair`, `Poor`, and `Very Poor`. If anything else is provided, such as numeric values, the field will be left blank in TE.
borrower.credit_score_date	The date the contact's credit score was checked. If blank or incorrectly formatted, the field will be left blank in TE.
borrower.credit_score_expiration_date	The date the contact's current credit score expires. If blank or incorrectly formatted, the field will be left blank in TE.

Co-Borrower–Related Headers

The following loan headers relate specifically to the co-borrower. If the co-borrower's information does not match an existing contact record in the target user's list and enough information to create a record is provided, a new contact record will be created. If insufficient information is provided (for example, just first and last name), no contact will be created, but the loan record import will still succeed.

Loan Template Field Name	Description
coborrower-contact-group.name	List of groups the contact should belong to in TE. If a group name does not already exist, it will be created. Add multiple groups by separating the names with commas (and no spaces). For example: `clients,in process`.
coborrower.external_id	
coborrower.title	For example, `Mr.`, `Mrs.`, or `Captain`.
coborrower.first_name	
coborrower.last_name	

Loan Template Field Name	Description
coborrower.suffix	For example, `Sr.`, `Jr.`, or `III`.
coborrower.email	The contact's primary email address.
coborrower.email_work	A secondary email address. This will be used when sending a message from TE if the primary address is blank.
coborrower.ok_to_email	A value that determines whether the system will allow or suppress emails to this contact. A value of `yes` or `1` here will allow emails to be sent. Any other value (including blank) will be interpreted as opted out.
coborrower.address	
coborrower.address_2	
coborrower.city	
coborrower.state	
coborrower.zip	
coborrower.ok_to_mail	A value that determines whether the system will allow or suppress physical mail to this contact. A value of `yes` or `1` here will allow mail to be sent. Any other value (including blank) will be interpreted as opted out.
coborrower.phone_cell	If the format is anything other than `(###) ###-####`, the text will be imported as-is, but will be flagged as incorrectly formatted on the contact details page.
coborrower.phone_office	If the format is anything other than `(###) ###-####`, the text will be imported as-is, but will be flagged as incorrectly formatted on the contact details page.
coborrower.phone_home	If the format is anything other than `(###) ###-####`, the text will be imported as-is, but will be flagged as incorrectly formatted on the contact details page.
coborrower.ok_to_call	A value that determines whether the system will allow or suppress calls to this contact. A value of `yes` or `1` here will allow calls to be made. Any other value (including blank) will be interpreted as opted out.
coborrower.employer	
coborrower.employer_address	
coborrower.employer_address_2	
coborrower.employer_city	
coborrower.employer_state	
coborrower.employer_zip	
coborrower.lead_source	Text indicating the way the contact was discovered. If a source name does not already exist, it will be created.
coborrower.creation_date	The date the record was created. If blank or incorrectly formatted, the date the import is performed will be written to this field in TE.

Loan Template Field Name	Description
coborrower.last_modified_date	The date the record was most recently changed. If blank or incorrectly formatted, the field will be left blank in TE.
coborrower.birthday	The contact's date of birth. If blank or incorrectly formatted, the field will be left blank in TE. Depending on your organization's setup, the year may be suppressed.
coborrower.last_contacted_date	The date the contact was most recently contacted (by any means). If blank or incorrectly formatted, the field will be left blank in TE.
coborrower.referred_to	The name of the person to whom this contact has been referred.
coborrower.referred_by	The name of the person who referred this contact to you.
coborrower.credit_score	Valid values are `Excellent`, `Good`, `Fair`, `Poor`, and `Very Poor`. If anything else is provided, such as numeric values, the field will be left blank in TE.
coborrower.credit_score_date	The date the contact's credit score was checked. If blank or incorrectly formatted, the field will be left blank in TE.
coborrower.credit_score_expiration_date	The date the contact's current credit score expires. If blank or incorrectly formatted, the field will be left blank in TE.

Buyer's Agent–Related Headers

The following loan headers relate specifically to the buyer's agent. If the buyer's agent's information does not match an existing contact record in the target user's list and enough information to create a record is provided, a new contact record will be created. If insufficient information is provided (for example, just first and last name), no contact will be created, but the loan record import will still succeed.

Loan Template Field Name	Description
buyers_agent-contact-group.name	List of groups the contact should belong to in TE. If a group name does not already exist, it will be created. Add multiple groups by separating the names with commas (and no spaces). For example: `clients,in process`.
buyers_agent.external_id	
buyers_agent.first_name	
buyers_agent.last_name	
buyers_agent.email	The contact's primary email address.
buyers_agent.email_work	A secondary email address. This will be used when sending a message from TE if the primary address is blank.
buyers_agent.address	
buyers_agent.address_2	
buyers_agent.city	
buyers_agent.state	
buyers_agent.zip	

Loan Template Field Name	Description
buyers_agent.phone_cell	If the format is anything other than `(###) ###-####`, the text will be imported as-is, but will be flagged as incorrectly formatted on the contact details page.
buyers_agent.phone_office	If the format is anything other than `(###) ###-####`, the text will be imported as-is, but will be flagged as incorrectly formatted on the contact details page.
buyers_agent.phone_home	If the format is anything other than `(###) ###-####`, the text will be imported as-is, but will be flagged as incorrectly formatted on the contact details page.
buyers_agent.employer	
buyers_agent.employer_address	
buyers_agent.employer_address_2	
buyers_agent.employer_city	
buyers_agent.employer_state	
buyers_agent.employer_zip	
buyers_agent.employer_license_number	
buyers_agent.license_number	

Seller's Agent–Related Headers

The following loan headers relate specifically to the seller's agent. If the seller's agent's information does not match an existing contact record in the target user's list and enough information to create a record is provided, a new contact record will be created. If insufficient information is provided (for example, just first and last name), no contact will be created, but the loan record import will still succeed.

Loan Template Field Name	Description
sellers_agent-contact-group.name	List of groups the contact should belong to in TE. If a group name does not already exist, it will be created. Add multiple groups by separating the names with commas (and no spaces). For example: `clients,in process`.
sellers_agent.external_id	
sellers_agent.first_name	
sellers_agent.last_name	
sellers_agent.email	The contact's primary email address.
sellers_agent.email_work	A secondary email address. This will be used when sending a message from TE if the primary address is blank.
sellers_agent.address	
sellers_agent.address_2	
sellers_agent.city	
sellers_agent.state	
sellers_agent.zip	

Loan Template Field Name	Description
sellers_agent.phone_cell	If the format is anything other than `(###) ###-####`, the text will be imported as-is, but will be flagged as incorrectly formatted on the contact details page.
sellers_agent.phone_office	If the format is anything other than `(###) ###-####`, the text will be imported as-is, but will be flagged as incorrectly formatted on the contact details page.
sellers_agent.phone_home	If the format is anything other than `(###) ###-####`, the text will be imported as-is, but will be flagged as incorrectly formatted on the contact details page.
sellers_agent.employer	
sellers_agent.employer_address	
sellers_agent.employer_address_2	
sellers_agent.employer_city	
sellers_agent.employer_state	
sellers_agent.employer_zip	
sellers_agent.employer_license_number	
sellers_agent.license_number	

Settlement Agent–Related Headers

The following loan headers relate specifically to the settlement agent. If the settlement agent's information does not match an existing contact record in the target user's list and enough information to create a record is provided, a new contact record will be created. If insufficient information is provided (for example, just first and last name), no contact will be created, but the loan record import will still succeed.

Loan Template Field Name	Description
settlement_agent-contact-group.name	List of groups the contact should belong to in TE. If a group name does not already exist, it will be created. Add multiple groups by separating the names with commas (and no spaces). For example: `clients,in process`.
settlement_agent.external_id	
settlement_agent.first_name	
settlement_agent.last_name	
settlement_agent.email	The contact's primary email address.
settlement_agent.email_work	A secondary email address. This will be used when sending a message from TE if the primary address is blank.
settlement_agent.address	
settlement_agent.address_2	
settlement_agent.city	
settlement_agent.state	
settlement_agent.zip	

Loan Template Field Name	Description
settlement_agent.phone_cell	If the format is anything other than `(###) ###-####`, the text will be imported as-is, but will be flagged as incorrectly formatted on the contact details page.
settlement_agent.phone_office	If the format is anything other than `(###) ###-####`, the text will be imported as-is, but will be flagged as incorrectly formatted on the contact details page.
settlement_agent.phone_home	If the format is anything other than `(###) ###-####`, the text will be imported as-is, but will be flagged as incorrectly formatted on the contact details page.
settlement_agent.employer	
settlement_agent.employer_address	
settlement_agent.employer_address_2	
settlement_agent.employer_city	
settlement_agent.employer_state	
settlement_agent.employer_zip	
settlement_agent.employer_license_number	
settlement_agent.license_number	

Headers for Product Records

The products template contains all the same fields as the contacts template, plus the additional fields shown below. An external ID and an account number are required in addition to the required fields for the contact.

Product Template Field Name	Notes
account_classification.type	
account_classification.system_name	
loan-status.status	
loan-type.type	
account.external_id	
account.account_number	
account.source	
account.address_1	
account.address_2	
account.city	
account.state	Use the 2-character postal code. If anything else is provided, such as full state names, the field will be left blank in TE.
account.postal_code	
account.account_name	
account.open_date	
account.is_active	

Headers for Recruiting Records

The recruiting template contains all the same fields as the contacts template, plus the additional fields shown below. No further fields are required other than those for creating the contact.

Recruiting Template Field Name	Notes
regional-manager.external_id	
branch-manager.external_id	
division-manager.external_id	
contact-state-license.state	
contact-recruit.nmls_id	
contact-recruit.ust_is_complete	
contact-recruit.background	
contact-recruit.years_experience	
contact-recruit.has_resume	
contact-recruit.resume_url	
contact-recruit.corporate_objective	
contact-recruit.sourced_percentage	
contact-recruit.volume_last_12_months	
contact-recruit.volume_last_12_months_date	
contact-recruit.units_last_12_months	
contact-recruit.units_last_12_months_date	
contact-recruit.commission_split	
contact-recruit.commission_cap	

Headers for User Records

The user template contains fields to define the profile of users for your organization. Role name, user type name, and email address are required *in addition to* those for creating the contact, though full name and marketing information are recommended.

User Template Field Name	Notes
role.name	
user-type.name	Must be set to `Lender`.
team.name	
user.external_id	
user.email	
user.username	
user.password	
user.status	
user.is_trial	

User Template Field Name	Notes
user-detail.job_title	
user-detail.f_name	
user-detail.l_name	
user-detail.company	
user-detail.website	
user-detail.testimonial_website	
user-detail.phone_home	
user-detail.phone_cell	
user-detail.phone_office	
user-detail.phone_fax	
user-detail.address	
user-detail.address_two	
user-detail.city	
user-detail.state	Use the 2-character postal code. If anything else is provided, such as full state names, the field will be left blank in TE.
user-detail.zipcode	
user-detail.timezone	Numerical offset from UTC. For example, Central (US) Standard Time would be entered as `-6`.
user-detail.timezone-name	Standard tz database name for the time zone. For example, most of Central (US) Standard Time would be entered as `America/Chicago`.
user-detail.cost_center	
user-detail.location_id	
user-detail.collab_approval	
user-settings-marketing.agent_bio	
user-settings-marketing.application_url	
user-settings-marketing.license_title	
user-settings-marketing.profile_img	Full URL for the user's profile image (must include file extension). Recommended file type .jpg or .png. Example format: `https://example.com/images/profileimage.jpg`. Root URL must be added as an accepted image host in `organization_settings.user.profile_img_host` (example value for this setting: `example.com`).
user-settings-marketing.logo_img	Full URL for the user's logo image (must include file extension). Recommended file type .png. Example format: `https://example.com/images/logoimage.png`. Root URL must be added as an accepted image host in `organization_settings.user.profile_img_host` (example value for this setting: `example.com`).
user-settings-marketing.social_facebook	
user-settings-marketing.social_twitter	

User Template Field Name	Notes
user-settings-marketing.social_youtube	
user-settings-marketing.social_linkedin	
user-settings-marketing.social_google	
user-settings-mls.mls_id	
user-settings-mls.agent_id	

Headers for Co-Marketing Partner Records

The co-marketing partner template contains fields to define the profile of co-marketing partners connected with users in your organization.

User Template Field Name	Notes
user.email	
agent-user.external_id	
agent-user.type_id	
agent-user.username	
agent-user.email	
agent-user.status	
role.name	
user-detail.job_title	
user-detail.f_name	
user-detail.l_name	
user-detail.company	
user-detail.website	
user-detail.testimonial_website	
user-detail.phone_home	
user-detail.phone_cell	
user-detail.phone_office	
user-detail.phone_fax	
user-detail.address	
user-detail.address_two	
user-detail.city	
user-detail.state	
user-detail.zipcpde	
user-detail.timezone	
user-detail.timezone_name	
user-detail.cost_center	
user-detail.location_id	
user-detail.collab_approval	

User Template Field Name	Notes
user-settings-marketing.agent_bio	
user-settings-marketing.application_url	
user-settings-marketing.license_title	
user-settings-marketing.social_facebook	
user-settings-marketing.social_twitter	
user-settings-marketing.social_youtube	
user-settings-marketing.social_linkedin	
user-settings-marketing.social_google	
user-settings-mls.mls_id	
user-settings-mls.agent_id	
expenditure-approver.id	
expenditure-approver.email	