Using the Data Importer

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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 using the Data Importer feature itself; see *Data Importer CSV File Setup* for requirements and setup instructions.

Importing Data

The process of importing data includes several steps. You must complete all of the steps to import your data.

Navigation and Starting an Import Job

1. Select **Import Data** in the navigation menu.
   The Data Imports page appears. Here, you will see a list of any previous import jobs, including information about each, sorted by date. On the right side, there are links to download templates for each type of import your user has permission to perform.

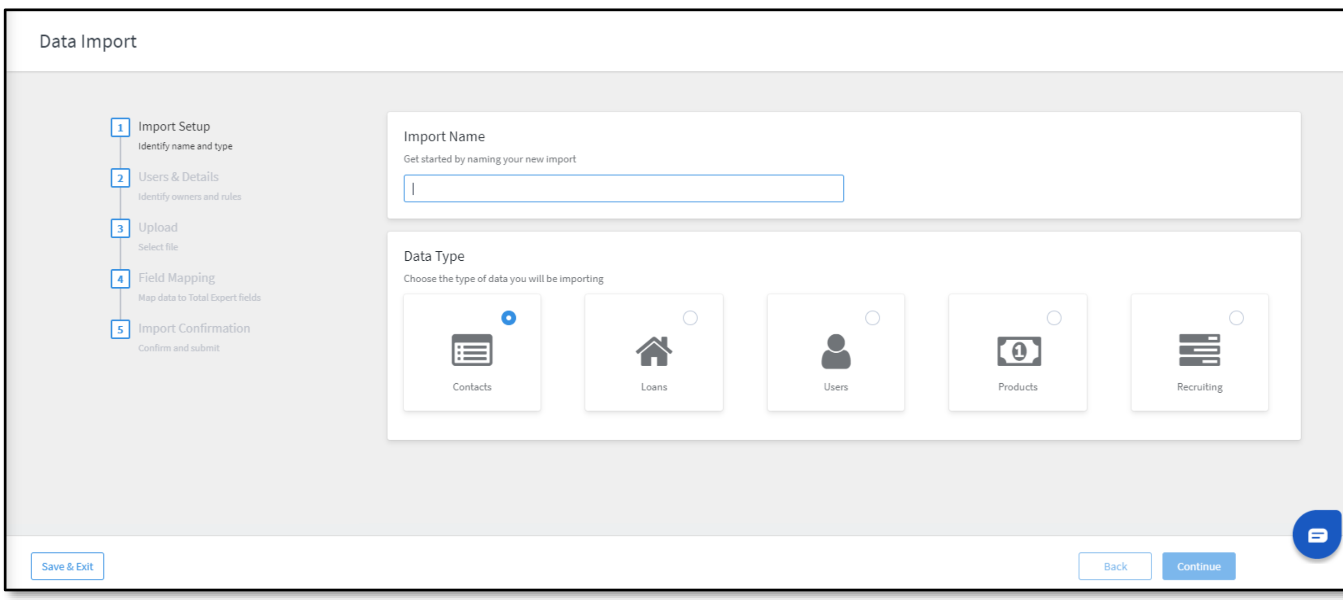
Note
To use the feature, you must prepare a CSV file including the data to import. You are not required to use a provided template, but doing so will simplify the field mapping process. See *Data Importer CSV File Setup* for information on preparing this file.

2. Click the **+New Data Import** button in the upper-right corner of the page.

Tip
The import tool opens, showing step 1 on a progress bar on the left side. You can click the **Save & Exit** button in the lower-left corner of the page at any stage of setting up the import job. You can resume a saved setup from the Data Imports page at a later time. See Saving and Restoring Import Jobs below.

Progress Bar Step 1: *Import Setup*

3. In the **Import Name** field, enter a name for the import job you are beginning. The name does not need to be unique, but using a consistent naming scheme will help you locate specific jobs on the Data Imports page later.
4. In the Data Type section, select the radio button corresponding to the type of data contained in your CSV file. Contacts is selected by default. (Non-administrator users will only see the Contacts and Leads options.)
5. Click the **Continue** button in the lower-right corner of the page. This button is inactive until all required selections on the page have been made.



Progress Bar Step 2: *Users & Details*

Note
When importing users or co-marketing partners, step 6 (users data should be added to) and step 8 (automatic marketing) do not apply.

6. (Administrator users only; other users will not see this option and should skip to step 7.) In the Import Ownership section, select 1 of the following options:
    a. **Single User** – Select this option if all the data in the import file should be added to a single user's account. Then:
        i. Use the search box to locate the desired user by user ID, first name, last name, email address, or user role.
        ii. Select the desired user from the list of results.

> **Note**
> If your search does not return the user you expect, contact customer support.

    b. **Multiple Users** – Select this option if the data in the import file should be divided among more than 1 user.

> **Note**
> In this case, you must indicate the users to which each record will be assigned by way of a column in the CSV file itself, which you will have to map along with the other columns later.
>
> This column must include either the email address or the external ID of the user each record should be assigned to. A single CSV file can include either email addresses or external IDs, but not a mixture of these. See *Data Importer CSV File Setup* for more details on setting up your file.
>
> It is possible to import records to user accounts that are currently inactive. This allows you to set up a new user with relevant data before enabling their account. However, be aware that the system does not prevent data from being imported for these users (including those who are not intended to be reactivated), so be sure to specify the intended user(s) when setting up the import.

7. In the Date Format section, select a default date format. This is the date format the importer will look for in the CSV file. Dates formatted in any other fashion will not be recognized and the data in those columns will not import. The common MM/DD/YYYY format is selected by default.

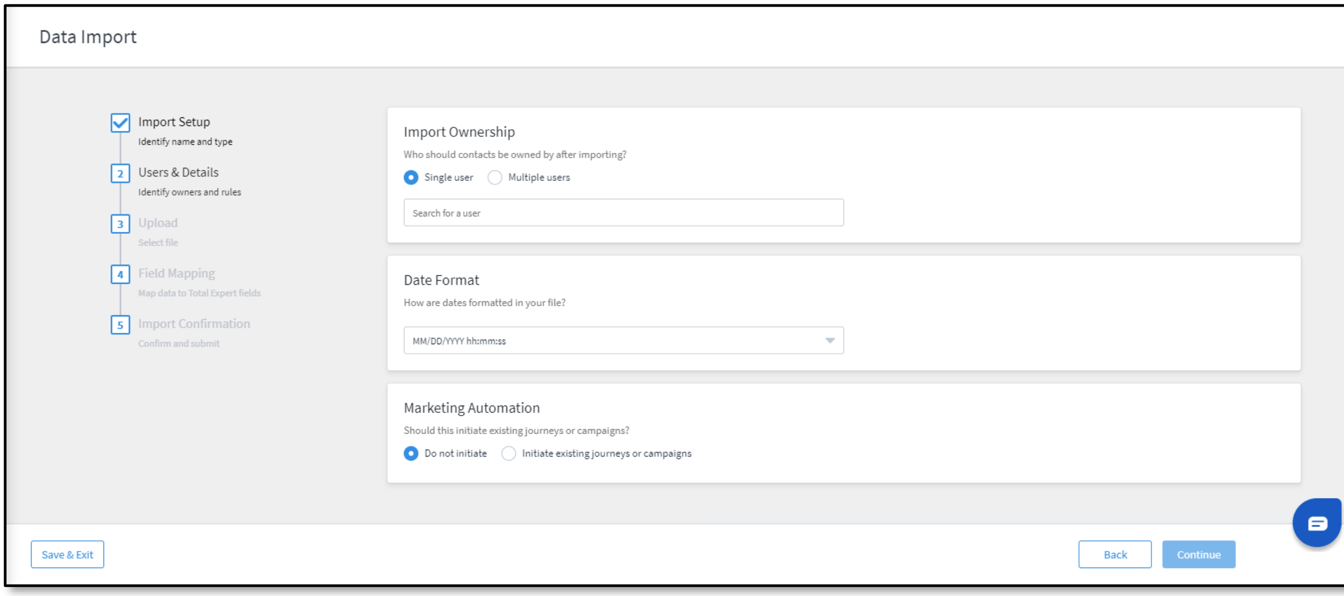
> **Note**
> The importer assumes all imported dates are in UTC and stores them in the database as such. (This is standard for data transfers.) However, Total Expert displays dates in the user's time zone. This makes it possible for the date in the database to be different from the date on the imported .csv file. For example:
>
> A row in an imported .csv file has a Contact Creation Date of 10/10/2022 03:15:21 am. The system writes this to the database as: `2022-10-10 03:15:21` (UTC). If the customer is currently on Central Daylight Time, which is 5 hours earlier than UTC, the record is displayed in Total Expert as 10/09/2022 at 10:15:21 pm.

8. In the Marketing Automation section, select 1 of the following options:
    a. **Do not initiate** – Select this option if you want to manually determine how each imported contact should be added to automated marketing campaigns. (This option is selected by default.)
    b. **Initiate existing journeys or campaigns** – Select this option *only* if you want every newly created or updated contact from this import job to begin receiving communication from any marketing campaigns they are added to via automation.

Warning

If you select the 2nd option, automation will begin when the import is complete and cannot be stopped for all imported contacts at once—only for each contact individually.

9. Click the **Continue** button in the lower-right corner of the page. This button is inactive until all required selections on the page have been made.



Progress Bar Step 3: *Upload*

10. Drag and drop a file into the upload area (or click anywhere in the upload area and locate your file through the file selector window). The file must be in CSV format and cannot exceed 50 MB. When the file has uploaded successfully, it is listed with a blue check mark icon.

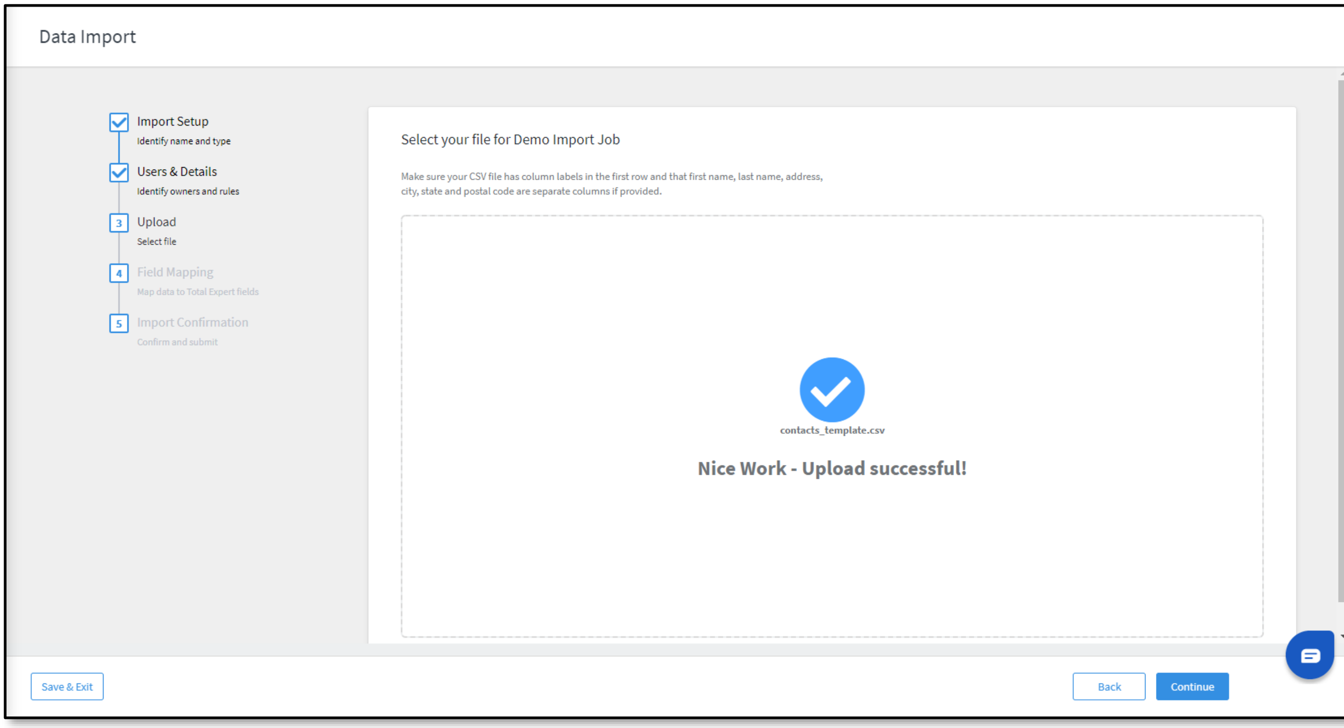
Note

You can only import 1 file at a time; if you add a second file, the first file will be removed.

Tip

Remember that if the CSV file includes records to be assigned to multiple users, it must include a column identifying which user each record is for.

11. Click the **Continue** button in the lower-right corner of the page. This button is inactive until a file has been uploaded.



Progress Bar Step 4: *Field Mapping*

12. Depending on which setup option you used for the headers in the CSV file, perform one of the following in the Map Fields section:
    a. If the headers were set according to the exact names given in the template, click the **Apply Defaults** button. This will automatically map the CSV file's columns to TE fields (including the column identifying which user each row is for, if applicable). When you click the **Yes** button in the confirmation box, the checkboxes for successfully mapped columns are selected, so you can quickly see whether any were missed. If any are missed, follow step b below to manually map those columns.
    b. If the headers were not matched to names given in the template, use the drop-down menus in the **Mapped Field** column to select the field in Total Expert's system that matches the purpose of each column in the CSV file. When you make a selection, the checkbox for the row is automatically selected, indicating that the data in that column will be imported. (You cannot select a box manually.)

Tip

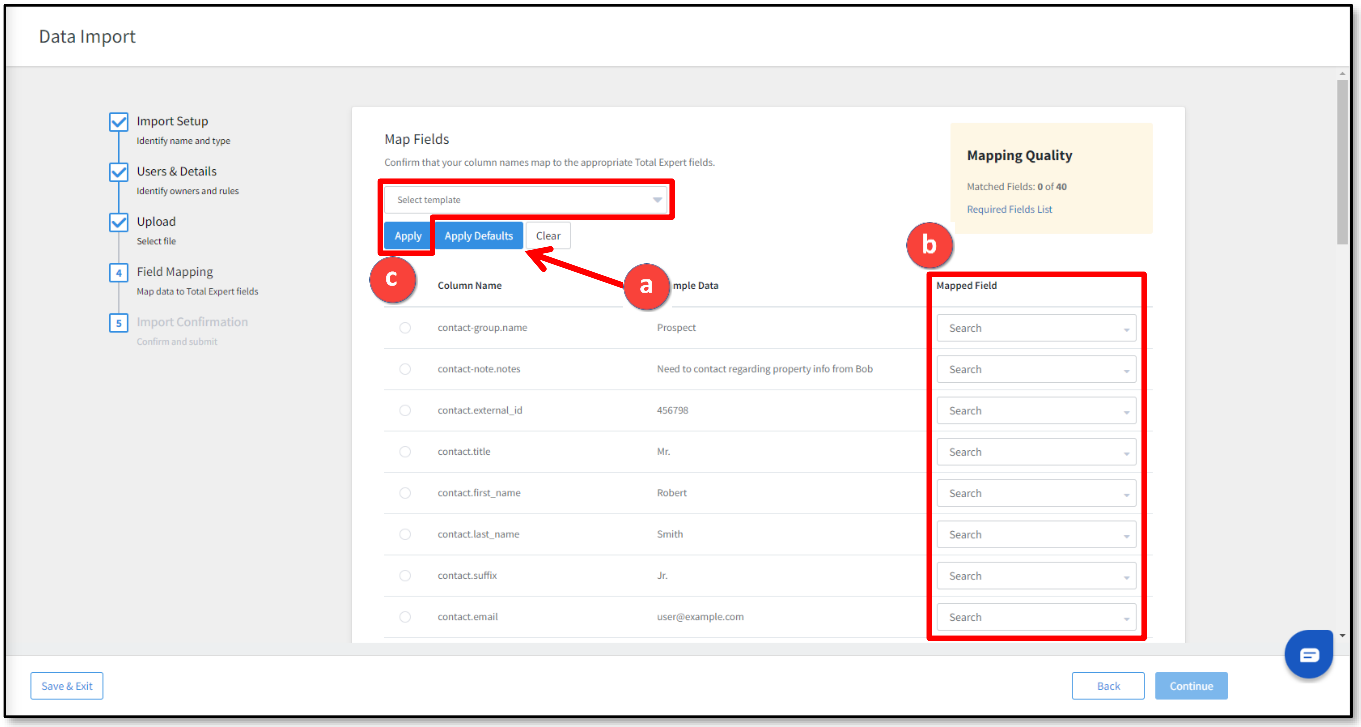
The list includes the appropriate fields for the type of data (such as contacts or loans) you indicated earlier that you are importing.

If you selected Multiple Users during Progress Bar Step 2, select either **User → Email** or **User → External ID** to map the content of the user-identifying column in the CSV file (depending on which type of data you used).

Warning

Before proceeding, verify that the data shown in the Example Data column is mapped and formatted as expected. In particular, verify that date formatting shown here, not that shown in Excel in the imported file, matches the format selected in step 7 above, as date format appearance in Excel may be misleading.

c. If you have a saved mapping template that applies to the current import job, select it from the **Select template** drop-down list and click the **Apply** button (not the Apply Defaults button). When you click the **Yes** button in the confirmation box, this applies the mapping for all the fields stored in the template.

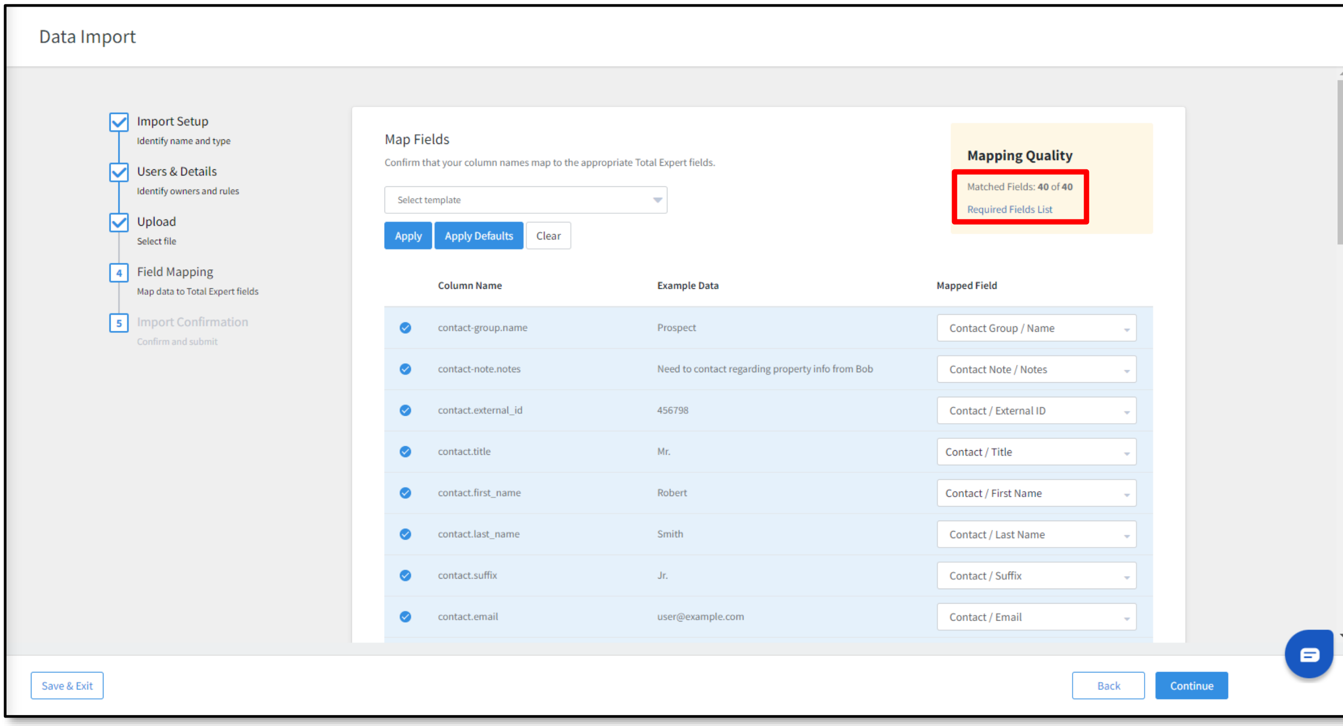


You can clear the mapping for an individual field by clicking its checkbox on the left. You can clear the mapping for all fields at once by clicking the **Clear** button. If a field that was previously mapped has been cleared, you can reapply the same mapping to that field by clicking its checkbox on the left.

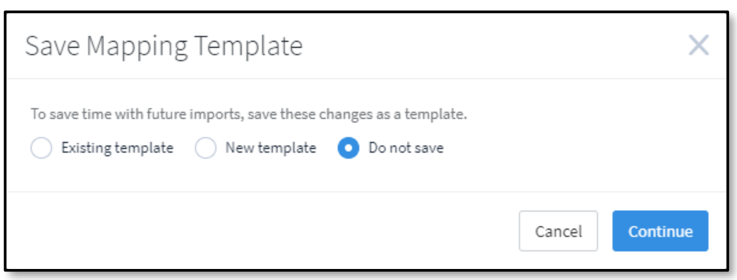
13. Click the **Continue** button in the lower-right corner of the page. This button is inactive until the minimum field requirements for the data type are mapped.

Tip

In the Mapping Quality section in the upper-right corner of the page, the Matched Fields value helps you track how many of the columns in the CSV file have had mapping applied. Click **Required Fields List** to see which fields are required for the current import job type.



14. Before the importer proceeds to Step 5, it prompts you about whether to save a custom mapping template to save time on future import jobs. Select 1 of the following options in the Save Mapping Template box:
    a. **Existing template** – Select this option if you want to use the current mapping to overwrite an existing mapping template. Select the template you want to update from the drop-down list and click the **Continue** button.
    b. **New template** – Select this option if you want to save the current mapping as a new mapping template. Enter a name for your new template in the box and click the **Continue** button.
    c. **Do not save** – Select this option if you do not want to make the current mapping available again in the future. This option is selected by default. Click the **Continue** button.



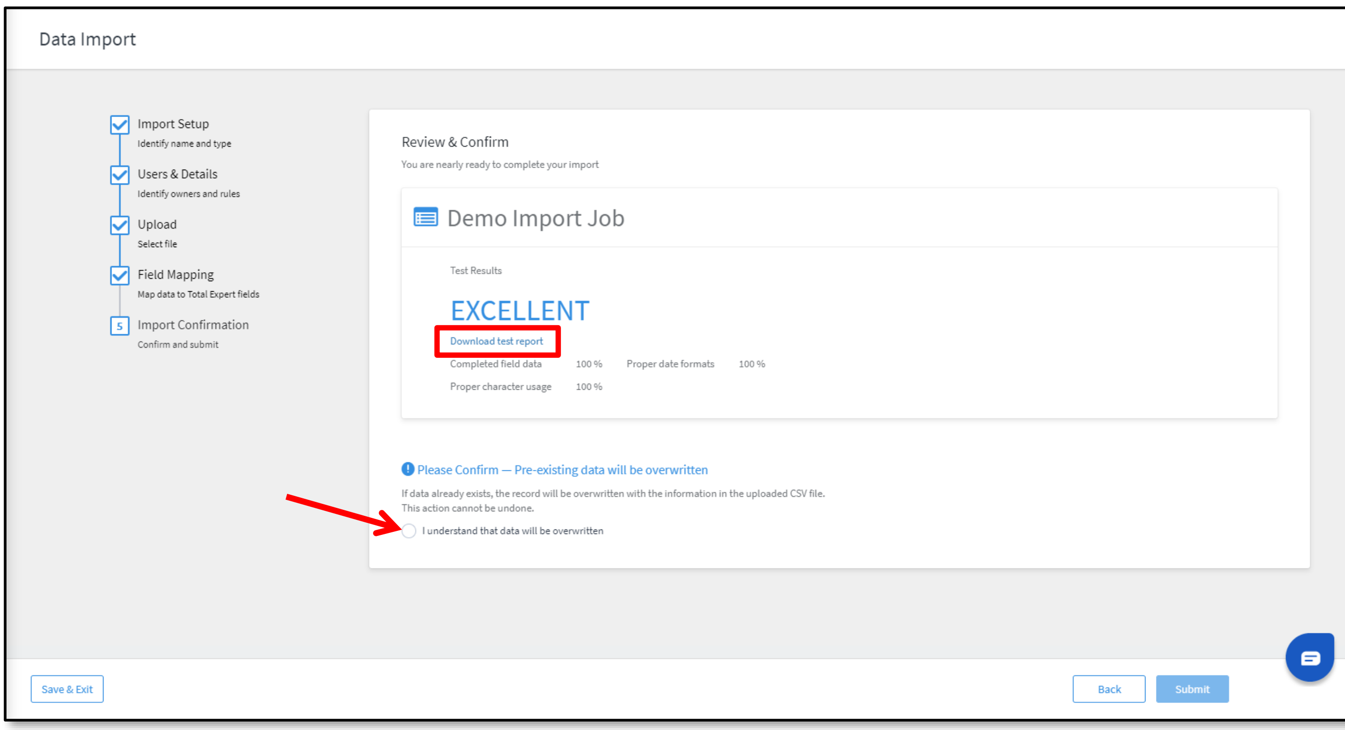
Progress Bar Step 5: *Import Confirmation*

15. In the Review and Confirm section, the name of your import job is shown, followed by the results of a verification test that ran in the background following the mapping step. Individual percentage scores are given for data completeness, date formats matching, and character usage. These are combined to provide an overall recommendation on whether the file should be imported.

Tip
If you want to see more detail regarding the verification results, click **Download test report**. Your browser begins downloading a CSV file that includes any rows from the uploaded file with errors, along with a column pointing out the error in each row.

Warning
If you believe changes are needed, click the **Back** button in the lower-right corner of the page to step backward through the importer. Do *not* use the browser's Back button, or you will lose all your import setup options.

16. If you are ready to proceed with importing your data, read the confirmation message below the report. This reminds you that if records in the CSV file are found to be duplicates of existing records, then the importer will use the data in the CSV file to overwrite conflicting data in those records.
17. Click the checkbox to indicate that you understand the statement on overwriting data.
18. Click the **Submit** button in the lower-right corner of the page. This button is inactive until you check the box.



You are returned to the updated import list, which includes any completed or saved import jobs and indicates the status of each. Your new import job has the status In Progress until the job is finished. Select **Actions → Review** to open a slide-out panel with details about the job. When the status changes to Complete, open this panel again to see a summary of the results.

Managing Import Jobs on the Data Imports Page

The list on the Data Imports page provides some options for you to manage and track previous import jobs.

To see the details of any import job in the list, select **Actions → Review**. A slide-out panel opens, displaying pertinent information about the job and its results.

Pagination and Filtering

The table shows up to 10 items at a time. If there are more than 10 items, use the pagination buttons below the table to view the remaining items.

Click the **Filter** button (funnel icon) above the table to open the Summary List Filters box. The filter options are:

- **Submitter User** – Select a user in your organization. The list will return only the jobs submitted by this user. (This option is only available to administrators.)
- **Target User** – Select a user in your organization. The list will return only the jobs where this user had the imported data directed to their account. (This option is only available to administrators.)
- **Status** – Select a status. The list will return only the jobs in this status. The options are:
    - Pending
    - Configuring
    - Submitted
    - Complete
    - Failed

You can clear a selection by clicking the small **x** that appears at the right end of the box after a selection is made.

When you click the **Apply Filters** button, the list is filtered to show only the jobs that match your selections.

Saving and Restoring Import Jobs

At any time during the setup of an import job, you can click the Save & Exit button in the lower-left corner. This creates an entry on the Data Imports page that retains all the options you selected (including the file you uploaded, if applicable).

You can resume a saved job later by locating it in the list and selecting **Actions → Resume**. The importer opens to the step where you left off with your prior selections already in place.

Error Reports

Following an import job, you can select **Actions → Review** to view a quick summary of the import job, including whether any records failed or were skipped. To review any errors, click **Download** under Detailed Error report. This downloads a CSV report that includes a copy of all the skipped records. Successfully imported records are excluded from the report. (If all records imported successfully, no report is available.)

In addition to the original data from the skipped records, the error report includes 2 new columns appended at the beginning: Warning and Reason. These columns provide information to help you determine how to fix the records so they can be imported.

Common Errors

The following are the 2 most common reasons given in error reports for skipped contact records.

1. **Warning** *Skipped*
   Reason *Failed to process record data. Verify data formatting. Message: Unable to satisfy locator queries. Missing data required to perform action on Contact.*
   a. This error indicates that the record does not meet the minimum requirements described in the *Data Importer CSV File Setup* document. Provide the missing information before re-importing these records.
2. **Warning** *Skipped*
   Reason *Failed to process record data. Verify data formatting. Message: Record contains unsupported characters*.
   a. This error indicates that the record includes one or more special characters that the importer cannot process. Remove these characters before re-importing these records.

A similar reason to that under #1 above (*…Missing data required to perform action on LoanParticipantContact.*) is possible when importing loans.

Note
Date fields that include data in a different format than what you selected when setting the field mapping will not be imported, but these will *not* generate an error in the error report because the rest of the record imports properly.

Best Practices

Before importing, ensure that all dates in the CSV file to be imported are in the same format so that the option you select in step 7 above captures all of the date fields correctly.

Leave the *Should this initiate existing journeys or campaigns?* option set to **Do not initiate** unless you want new and updated contacts to begin receiving marketing materials immediately. If you are importing existing contacts from another system, you will likely want to keep this turned off so your automated marketing campaigns do not treat these contacts as new. Likewise for loan imports that include closed or in process loans.

After completing an import, download and review the error report from the import list page. If the import included individual records that were skipped, the Status column reads Complete, even if some records imported successfully and some were skipped. Any skipped records will be listed in the error report; see Error Reports above.

Be patient at each step of the importer. It may take some time to process the data before it can proceed to the next step. Even after clicking Submit, the status column in the import list may read Pending while the job is queued. Imported records will not be available until the import job is complete.

Check your contacts list or loans list (depending on the type of import you completed) and ensure that everything appears as expected. If any of your imported data seems incorrect, please contact Total Expert Customer Support to determine how it can be corrected.