## How to Import Contacts

You may have some contact details stored on your computer from previous marketing projects. These can be easily transferred to your e-txt™ general contacts list.

There are 2 ways to do your initial import.

Importing from Outlook

In the import contacts screen select **outlook** and when you press **next** it will import from the route directory of your outlook.
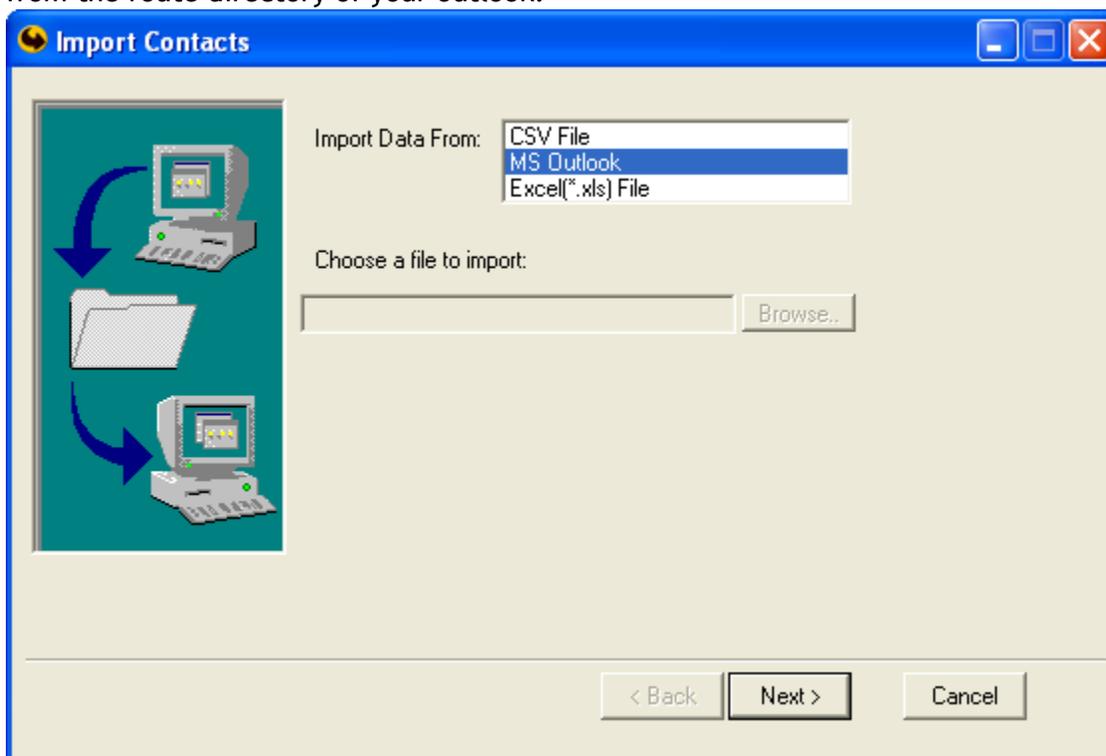
Importing from Excel or CSV

CSV means Comma Separated Values. It is a widely used standard for transferring information from one format to another. If your data is in any other database, it will translate to either CSV or Excel.

There are several variations on how to import, but you are likely to have something like this:


1) Mobile Numbers
For the import to work, all the numbers you import in one go must be in the same format. The mobile numbers above are formatted in different ways.

- The 1st is in "International Format" meaning just numbers with 44 in front of the number, and no leading '0'. This is accepted by e-txt™.

- The 2nd is in 'exponential format' which will not work. Sometimes the column is too narrow, sometimes the actual phone number has been lost and it is only storing the info seen in the view above. Expend the width of the column to check if all the data is actually still there. You **MUST** make the number look like a number before trying to import it. You can do this by right-clicking on the column header and formatting the cell to be a number with 0 decimal places. (see below)

- The 3rd Number is a mobile number written as an integer number. Excel has removed the leading '0' because it assumes it is not required. WARNING – e-txt™ will accept numbers in this format because it will assume it is an international Russian number! Add 44 to the start of the number to make it UK format.

- The 4th line is formatted as a conventional UK number with a gap. e-txt™ will automatically remove the gap for you.

- The last line is a UK mobile number, in a cell that has been formatted as Text. This is accepted by e-txt™.

Although as you can see above, several formats work for mobile numbers, you **MUST** ensure all numbers are **EITHER** International (begins with **44** in UK) or UK (starting **07**). If you can format your numbers in International Format as below, it will be easier later on.

If you are not in the UK (e.g. Eire) you will need your numbers to be in International format, e.g. start with **353**. If they are not, follow this procedure in Excel to get a list into this format:

- Remove leading '0's by formatting the mobile column as a **number**

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- In the next column along write " **@concatenate("353",B3)** " without the speech marks outside, and where B3 is the cell with the mobile number

- Copy the formula down your list e.g. by covering all Cells and doing **Ctrl D**

- **Copy** the whole column into the next free column BUT instead of using Paste, use **Paste Special / Values**

- **Delete** the first 2 mobile columns, leaving just the internationally formatted one, with a title on top

- Your numbers are now in international format

NB Whether you started with an Excel or CSV file, it is best to save it as an Excel File

2) **Other Fields**

You will see from looking in e-txt™ that you can use a range of different fields, including time, date and custom fields. Format them in the way you want them to appear in your contacts list, e.g. Initial Caps for names.

- If you want to record and remind people of Birthdays, it is best to store the date in an easy to index way as shown, and without the year of birth in that field. For example '08 23' for 23rd August.

- Don't worry if the information you want to store does not line up exactly with the headings in e-txt™, you can:

  - o Map headings in your import data to the headings in e-txt™ to make up for differences like 'surname' and 'lastname' (See **Importing Your Data** below)
  - o Rename custom fields as you wish.

3) **Importing Your Data**

- Select **General Contacts** from the e-txt™ tree control on the left side of the display.
- Go to **File->Import Contacts**, choose **CSV or Excel** (depending on the type of file you importing), and click **Browse** to find the file (probably saved in My Documents). Click **Next.**

- If your data file contains column headings, tick the box **Treat First Row As Header** (see below). If your data does not contain headings do not tick the box; e-txt™ will add the headings Col1, Col2… to your file. Click **Next**.
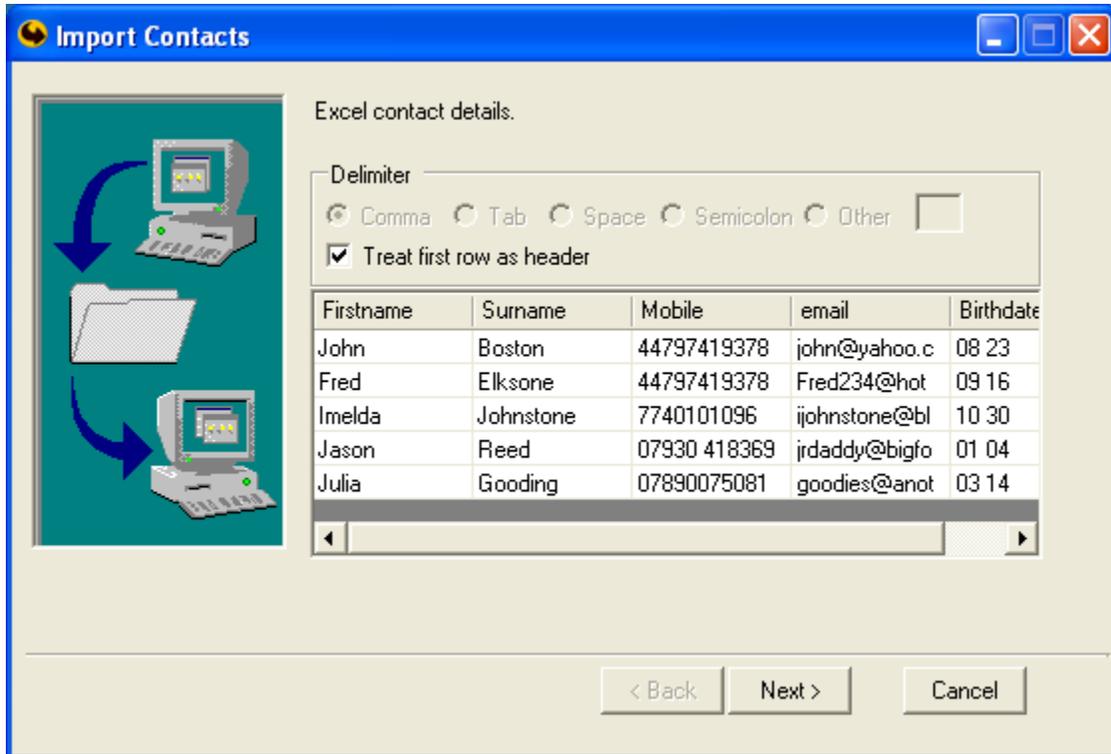
- Map each field in your data file to one of the standard e-txt™ fields as shown here:
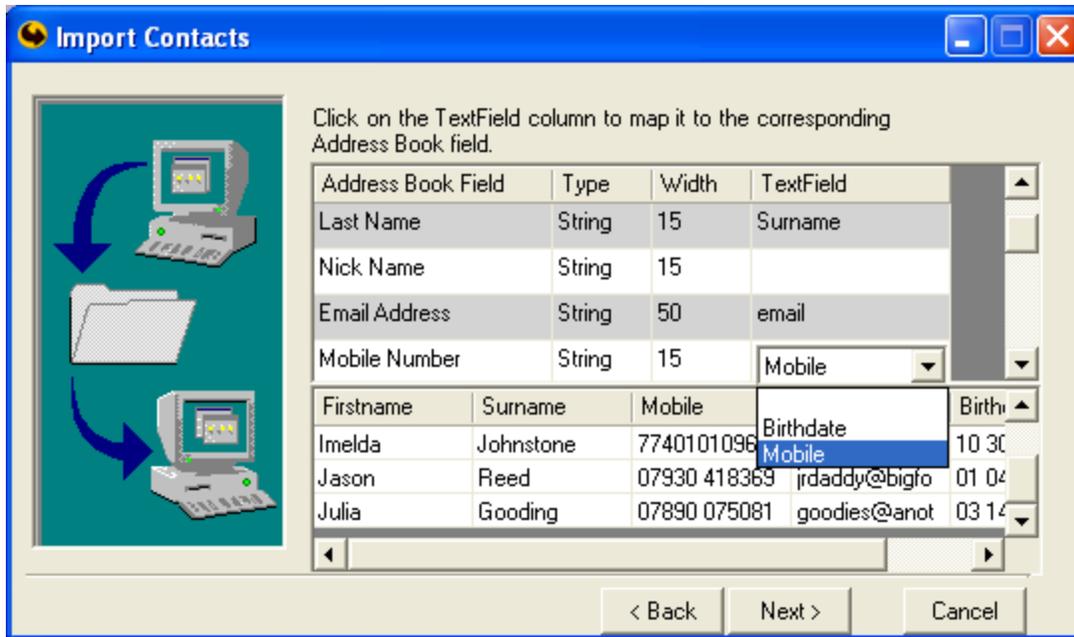
- Click **Next** to decide whether to add to a group (existing or new) e.g. "Management Staff" or "Bank Holiday Promotion", or just to enter into main contacts. (To understand groups, see **X.X How to work with groups**)
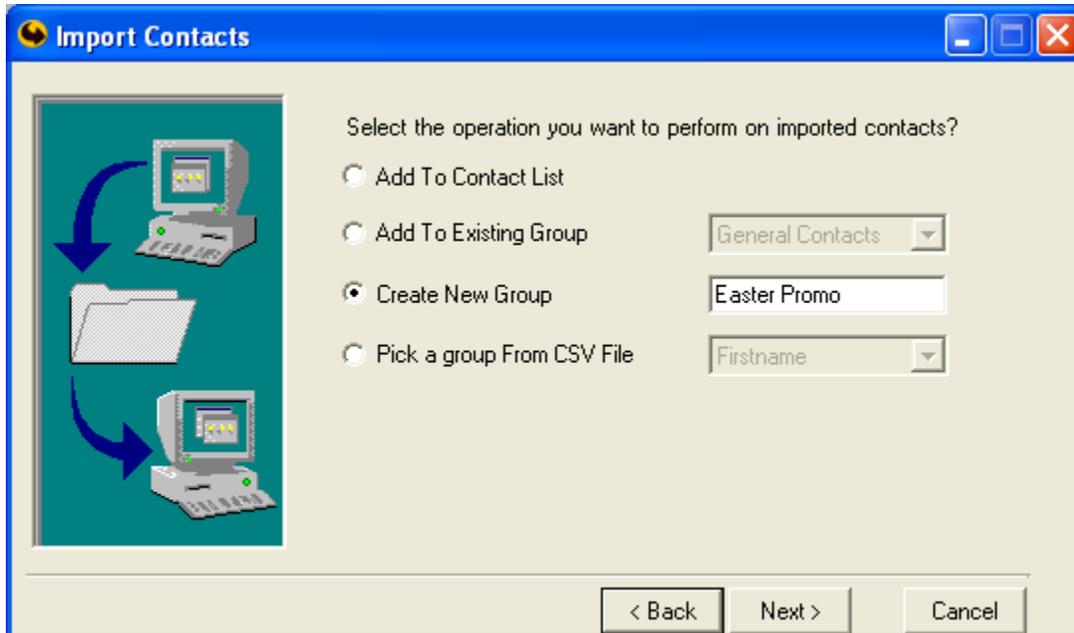
4) **Possible Errors Importing Numbers**

After you click **Next** again, e-txt™ checks your numbers for validity. This is an important screen to get right, but e-txt™ helps you through it!
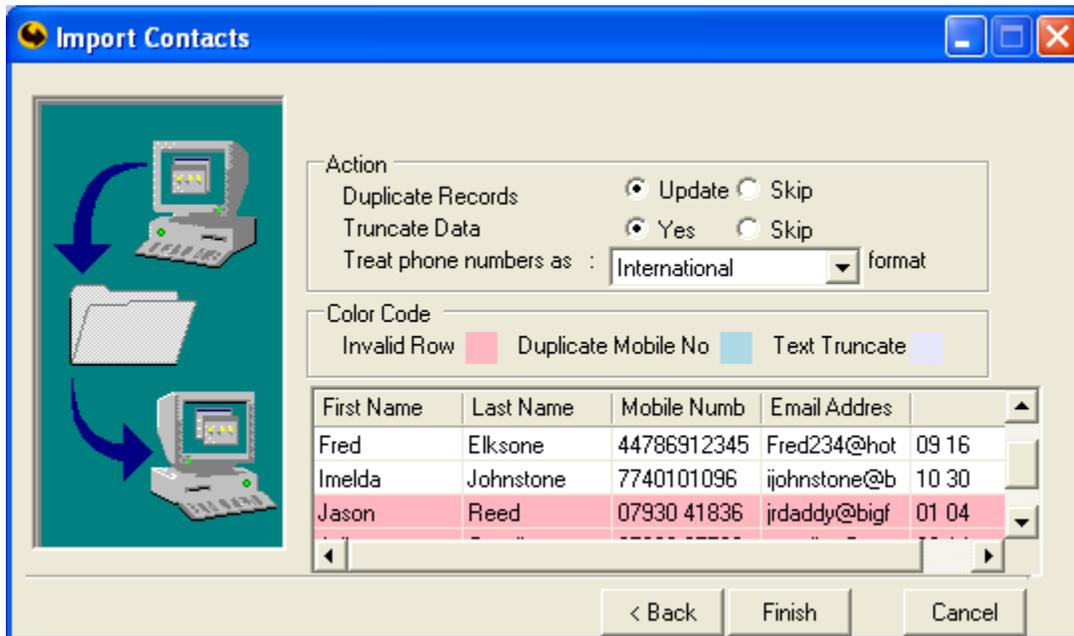
- **Treat phone number as**: The third 'action' specifies the format of the number being imported - either International Format or UK/India/USA. As we said above, you should not mix different formats on one import session.
- Numbers above have been rejected as international if they have a leading '0'
- NB. It has not rejected Imelda's number because it thinks '77' is a valid Russian number! In-fact, it is a UK number without a leading '0', and could be imported as a Russian number, which would not be very helpful.


Now look at the same screen if numbers are treated as UK Format
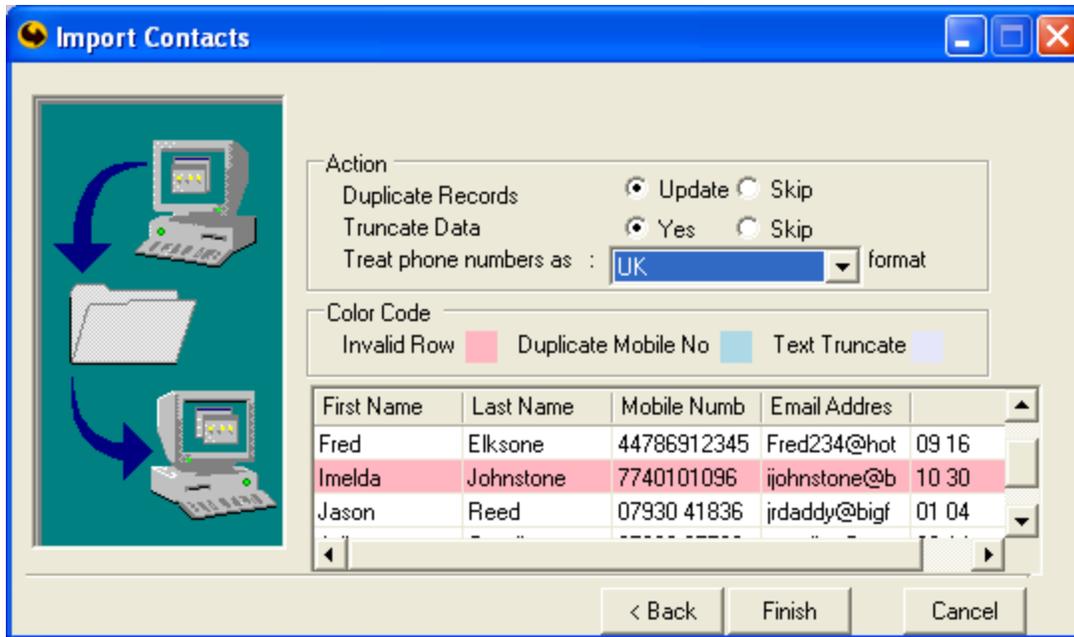
- e-txt™ has rejected Imelda because she does not have a leading '0'
- You need to go back and put a '0' in her number, or her record will not be imported
- NB It has not rejected Fred, even though his number is International format. e-txt™ can recognise and work with international format even in a 'UK' import.

5) Other possible errors
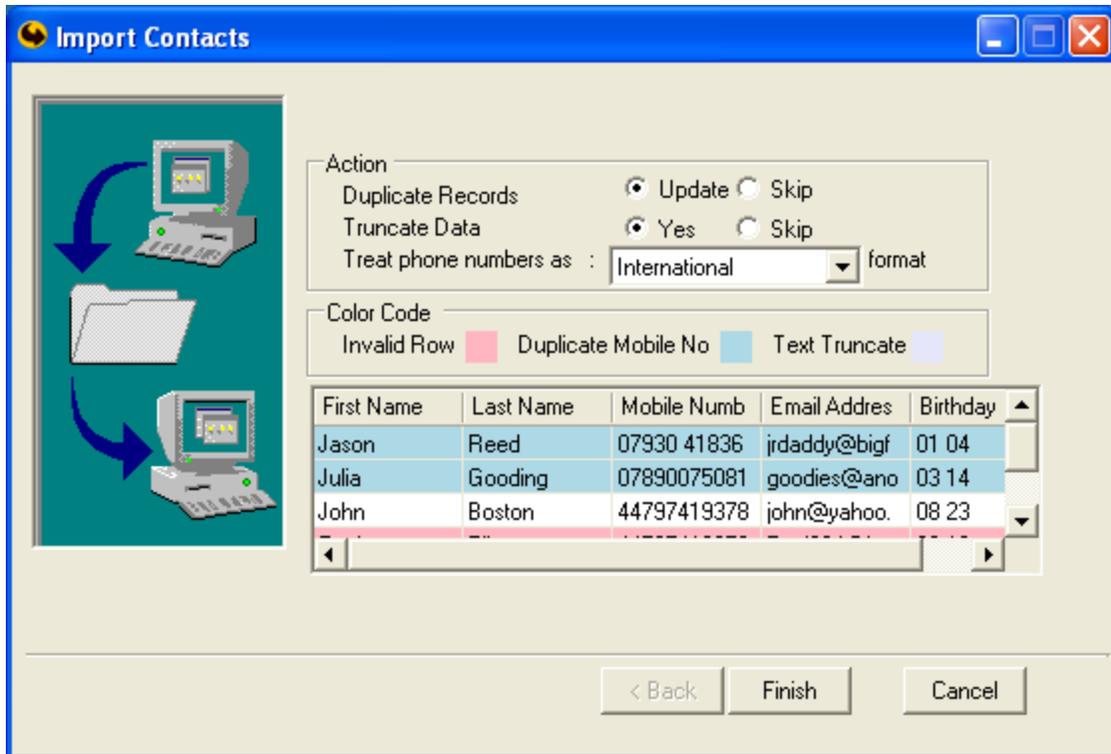
The first 2 questions in this window are in the Action section

- **Duplicate records**: If a mobile number is already in e-txt™, do you wish to overwrite the associated contact information with the newly imported data?
  - e-txt checks for Duplicates to existing Numbers. (See those names highlighted in blue above). The mobile number is the unique identifier in e-txt™ for each contact, so with a duplicate, it will either update or skip the record depending on your answer.

- **Truncate data**: If, for example, the address is too long for e-txt™ to handle, do you wish to import as much of the address as possible or Skip it completely? If text is too long it will be highlighted in Lilac

Next Click **Finish** and the database will be updated.

Importing contacts is simple in practice, we promise!