



## Procedure: Import Data From Excel Spreadsheet

August 2011

Preparation: 1) Add a new database in Riata™ CRM for the purpose of importing customer data. We do not recommend a data import directly into your live database. Imported records can be transferred from the “import database” that you have added to your live Riata database after the imported data has been audited, corrected, etc. 2) Prepare an Excel spreadsheet with column header titles that will correspond to Riata CRM data field names. The Excel spreadsheet must be saved in this format: Microsoft Excel 97– Excel 2003 & 5.0/95 Workbook (\*.xls). See example below.

A	B	C	D	E	F	G	H
Contact Name	Company	Address	Address 2	City	State	Zip	Phone
Leah Hollon	Appalachian College of Pharmacy	1060 Dragon Rd		Oakwood	VA	24631	276-498-5228
Mil Bickings	For Goodness Sake	102 Belmont Dr. S.W.		Leesburg	VA	20175	
Jennifer Campbell	Appalachian College of Pharmacy	1060 Dragon Rd.		Oakwood	VA	24631	276-498-5217

Data formatting is critical. Phone numbers cannot have spaces within the string. Emails must be in the standard format. Once all of your data is formatted properly the Excel spreadsheet must be saved in the format as shown above.

File name:

Save as type:

The Excel spreadsheet file will be the data source that Riata will use to import your customer data.

To begin the import procedure go to: Wizards | Import Contacts Wizard. Advance to the second dialog screen. Click “Select Import Wizard”, browse and select your Excel spreadsheet data source.

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### Import Contacts Wizard

**Select a file to import:**  
Use the Select File button to select the file that you wish to import. You can import:

- \* .ASC (ASCII comma separated values),
- \* .XLS (Microsoft Excel spreadsheets)
- \* .DBF (Visual Foxpro databases)

C:\DOCUMENTS AND SETTINGS\A

To continue, click Next.

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**Specify import file format options:**  
Specify the settings to use when importing your selected contacts file.

Import format:

Delimiter:

Enclosure character:

Select the formatting options in the third Wizard dialog box exactly as shown on the right: a) Delimited ASCII file; b) Comma; c) Double Quote.

Map Riata fields to the corresponding column header names on your Excel spreadsheet data source as shown below. Highlight an Import field, then the corresponding Riata field and click Assign.

### Import Contacts Wizard

Select the fields to import:

Import Fields	Contact Fields	Riata Fields
01: Company	(Company)	Industry
02: First	(First Name)	Last Contact
03: Last	(Last Name)	Next Contact
04: Address	(Address)	Salesperson
05: City	(City)	Territory
06: St	(ST)	Contacts
07: Zip	(Zip)	Freq
08: Phone	(Phone #)	Contact By
09: website	(Website)	
10: Industry	(Industry)	
11: Source	(Lead Source)	

From CSV file

Assign Unassign

Previous record Next record

Click the "Next" button after all fields from the Excel file have been assigned and select the import options as shown on the right. Notice that "Proper case" is recommended for the Company and Contact fields. Both fields can be assigned as upper case if desired.

### Select imports options for the contacts:

Specify the format options you want for the contacts to be imported.

#### Formatting options:

- Pre-format Phone numbers
- Format Company field
- Proper case
- Format Contact Field
- Proper case
- Zip code

Click the "Next" button to see the "Duplicate Contact Options" screen. Pass through this dialog box leaving the default settings. Turn off the "Report Options" selection in the following dialog box and click the "Next" button to advance to the file verification screen as shown below. Riata will show that your data source file was converted to a .csv format.

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### Import Contacts Wizard

**Finished!**

When you press the Start button, the file you selected will be imported and your contacts processed.

**Import file: \_3AN18MD8A.CSV**

To continue, click Start.

