3.5.2 How to format the CSV file

Data must be in ASCII format with values separated by commas or semi-colons. The csv format is frequently used to exchange data between the various applications.

If you wish to import data, they must be formatted in accordance with the following rules:

- **All comma separated** fields must be between quotation marks;
- You must include **all required fields** in the CRM (e.g. Surname and Company in the case of Leads); Fields with dashes, file extensions or justification spaces are not allowed;
- Fields containing **quotation marks cause problems**. If you wish to use them they must be enclosed between round brackets;
- To import **date type fields you can choose the format**;
- To import values into **standard picklist**, just enter the value in the cell and it will be imported. If this value is not present in the crm picklist, it will be added automatically, while if it is written in the same way both in the crm and in the CSV file, it will be connected normally;
- To import values in **multi-selection picklists** use the format: value1 [##] value2 [##] value3. (spaces and brackets included);
- The field headers must be in the first line of the csv file;
- When related fields are imported (e.g. the Contact who is connected to his Company), the CSV file must be formatted in a particular way, with a string to be able to connect said Contacts (or other module), with your Company (or other module whose main name must be written in the same way as it was entered in vtenext):

Name	**Surname**	**Account Name**
Lynda	Carter	Accounts::::Wonder LTD

Below we will list all the names to correctly set the related fields on the CSV file:

Modulo Name	**Prefix Name**	**Modulo Name**	**Prefix Name**
Accounts	Accounts::::	Assets	Assets::::
Calendar	Calendar::::	Campaigns	Campaigns::::
Contacts	Contacts::::	DDT	Ddt::::
Documents	Documents::::	Employees	Employees::::
FAQ	Faq::::	Trouble tickets	HelpDesk::::

Invoice	Invoice::::	Job Orders	JobOrder::::
Leads	Leads::::	Potentials	Potentials::::
Product lines	ProductLines::::	Products	Products::::
Project Milestones	ProjectMilestone::::	Projects	ProjectPlan::::
Project Tasks	ProjectTask::::	Quotes	Quotes::::
Purchase Order	PurchaseOrder::::		
Sales Order	SalesOrder::::	Service Contracts	ServiceContracts::::
Services	Services::::	Timecards	Timecards::::
Vendors	Vendors::::	Visit Report	Visitreport::::

The figure shows an example of a file for importing a lead. Each line represents a data set.

```
" Company" , "Street" , "City" , "Postalcode" , "Country", "Phone" , "Lastname"
"SampleInc" , "Samplestreet 123" , "Samplecity" , "12345" , "Germany" , "(123) 45678" , "Miller"
"Xyzcompany" , "Xyzstreet 321" , "Xyzcity" , "54321" , "Germany" , " " , "Jane"
```

	A	B	C	D	E	F	G	H	I
1	**Nome**	**Cognome**	**Telefono ufficio**	**Cellulare**	**Email**	**Azienda**	**Titolo**	**Assegnato a**	**Fonte**
2	Alessio	Bianchi	123458	332320232	bianchi@vtecrm.com	VTECRM ltd	sales account	matteo.barbieri	passaparola
3	Giuseppe	Rossi	456897	312126854	rossi@azienda.it	Azienda spa	CEO	matteo.barbieri	passaparola
4	Filippo	Ferrari	698515	355265482	ferrari@company.it	Company srl	IT manager	matteo.barbieri	passaparola
5									
6									

If you want to import contact data from your office application, ensure they are correctly formatted. Whenever you use MS Outlook proceed as explained below:

1. Check data format

In most cases the data must be checked and manually edited before importation. This is an important operation to ensure all the information is correctly formatted.

Now proceed as follows:

- Export the contacts from Outlook in Excel format; Launch Excel and open the file;
- Check all special characters such as comas, dots, semicolons, and quotation marks and replace any that give rise to problems, e.g. with a blank space;
- Check columns containing the compulsory fields, making sure that every single value is present in the different lines;
- Remove the initial column, if present, and all other columns that are not needed in vtenext, in order to streamline the importation process;
- Make sure the information you intend to use is present, because subsequent removal of mistakes in vtenext may require additional work.

2. Save the file in CSV format (DELIMITED BY THE LIST SEPARATOR)

From your Excel program (or similar), is possible to export (File + Save with name) in CSV format (comma separeted values) and save with this configuration. The file will be ready to be imported in the crm.

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