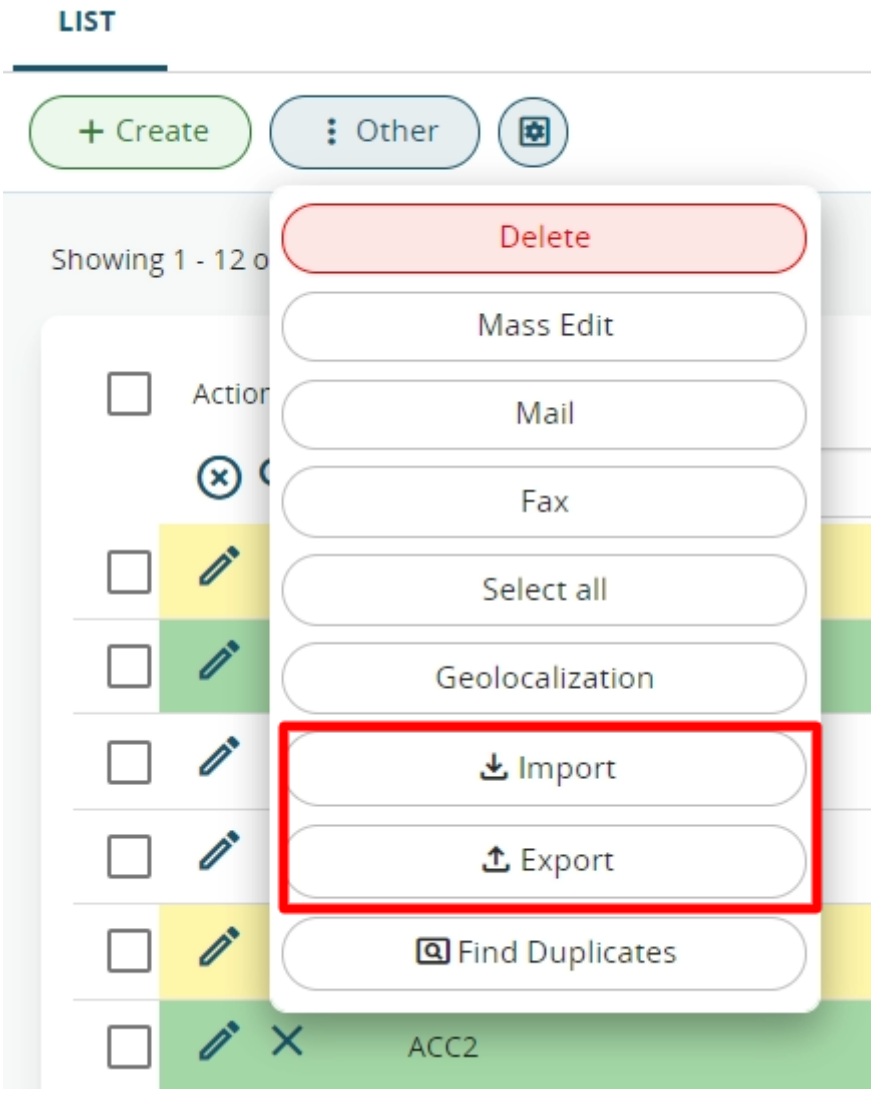
3.5.1 Imports

In all modules that involve master data, is possible to import data from CSV files, clicking on the button Other and then the button Import. The import is available in list view of the module.



Before uploading new data through the importation procedure, always:

- Check the match between column names in the csv files and the ones in vtenext;
- Perform a duplicates check according to the data already in vtenext.

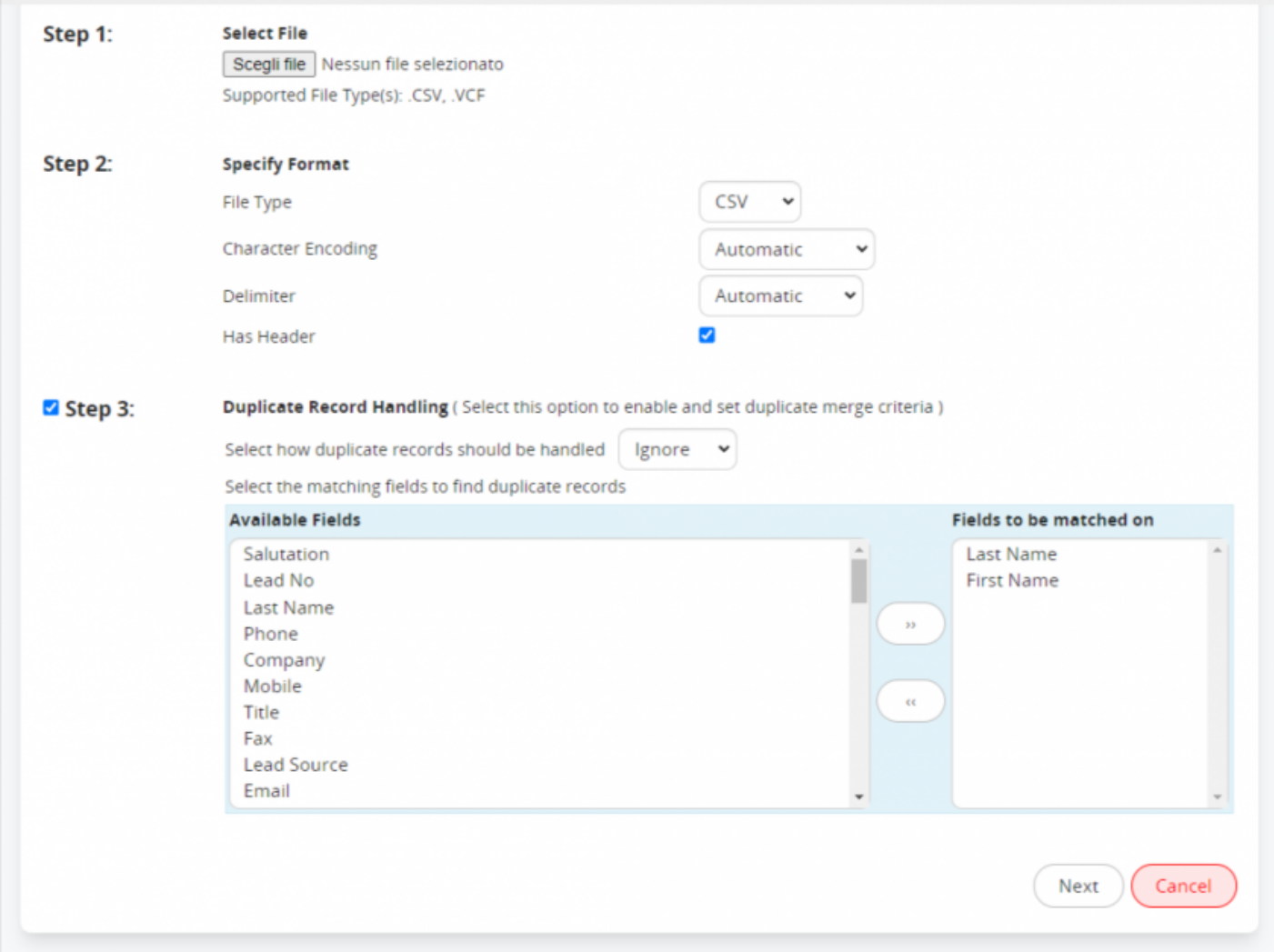
Warning! It is advisable to import files of up to 950 lines. If your databases has more lines, divide it into different files. This is a safety measure to avoid server overloads.

How to import:

STEP 1: Select the previously set csv file;

STEP 2: Specify the file type, the character encoding, the delimiter and whether it contains the column header in the first line. (We recommend maintaining the proposed settings).;

STEP 3: Select the mode for managing possible duplicate records between csv and vtenext from among the following modes present in the screen;



Ignore	the records present in vtenext will be maintained and the csv file data will not be imported;
Replace	the records present in vtenext will be deleted and new records will be created corresponding to those of the csv file.
Update	it includes an update of the records so that if a field in the CSV file is mapped, it is taken into account for the update and modified accordingly. Therefore, if the target field in the CRM is empty, it will be filled in; if the field in the CRM already contains a value, it will be updated with the new value from the CSV file.

Default Value	priority is given to the values to be imported from the CSV. Once those fields are mapped, the system checks all the record fields and applies the default value only if: 1. the value previously present in the record is empty 2. the field has not already been populated by the CSV import 3. the default value is not empty

Next, define the fields that will constitute the duplicates recognition key. A practical example is given below.
vtenext contains the following leads:

Name	Surname	Account	Email	Creation Date	Relations
Giorgio	Rossi	Rossi SPA	grossi@rossispa.it	01.01.2018	1 calendar activity
Giorgio	Rossi	Rossi SPA	grossi@rossispa.it	02.12.2018	1 Email

A data import from a csv file containing the following record is carried out 03-12-2018, mapping the name, surname and company.

Name	Surname	Account	Email	Phone
Giorgio	Rossi	Rossi SPA	grossi@rossispa.it	3331234567

Option 1: management of duplicates by means of the Skip (**Ignore**) option.
The situation remains unchanged:

Nome	Surname	Account	Email	Creation Date	Relations
Giorgio	Rossi	Rossi SPA	grossi@rossispa.it	01.12.2018	1 calendar activity
Giorgio	Rossi	Rossi SPA	grossi@rossispa.it	02.12.2018	1 Email

Option 2: duplicates management by means of the Replace option.
The records in vtenext are deleted and the csv file data remain valid:

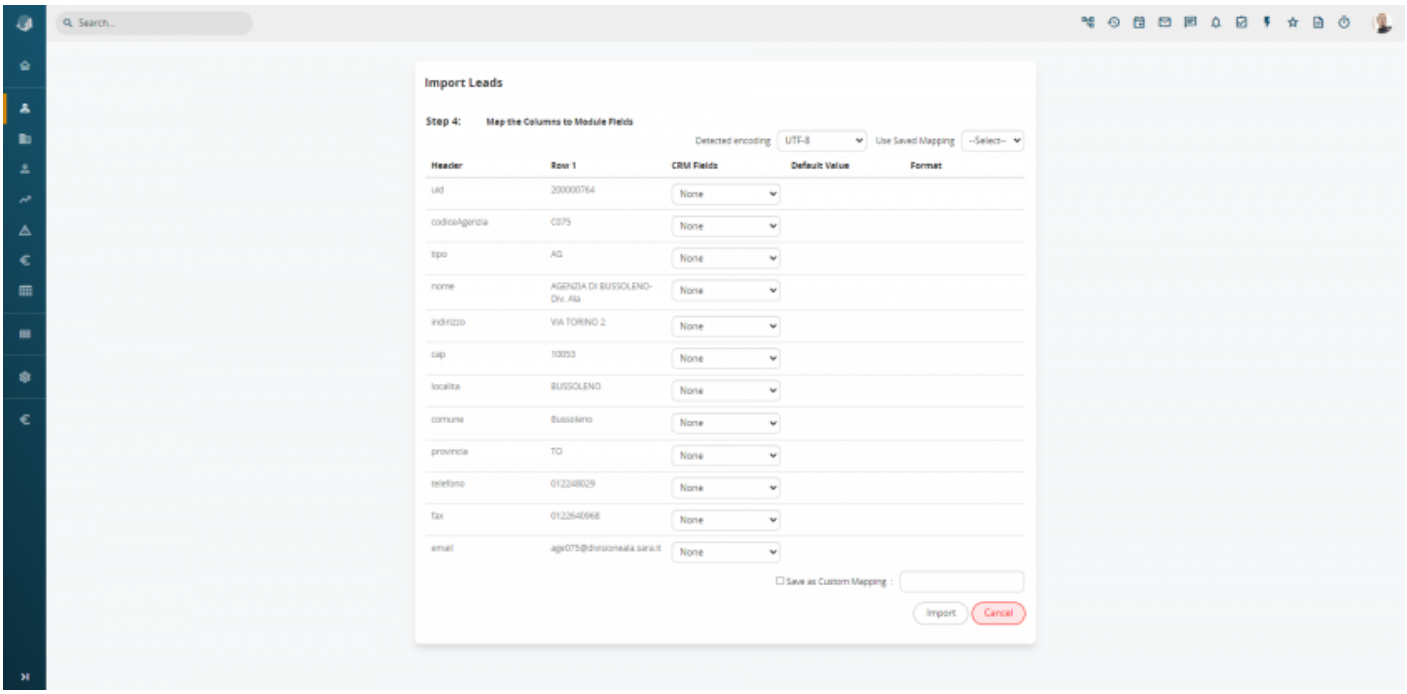
Name	Surname	Account	Email	Phone	Creation Date	Relations
Giorgio	Rossi	Rossi SPA	grossi@rossispa.it	3331234567	03.12.2018	No

Option 3: duplicates management by means of the Update option.
Among duplicated records in vtenext the most recent record is kept and merged with the csv file

record:

Name	Surname	Account	Email	Phone	Creation Date	Relations
Giorgio	Rossi	Rossi SPA	grossi@rossispa.it	3331234567	03.01.2018	1 Email

Proceeding with the NEXT button, you must now map your data according to the vtenext fields (whether standard fields or customised fields).



CRM field	Proposes the standard and customised fields in the module in which you are working.
Default Value	You can define the default value to set if the cell is empty in the csv file.

Note. To carry out multiple imports, you can save the mappings for a future use by flagging “Save as Customised mapping” and assigning a name. In future imports the Mapping will be available in the upper right in the popup menu.
Once you have finished mapping, click on Import to transfer your data to vtenext. In the last step the result of the importation will be shown.

Order to be respected in importing data related to other modules.
In case we have to import data that has relations with other modules, for examples accounts and contacts, we will import firstly the data of the module with the relation 1-N (an account has N contacts) and then the data with the relation N -1 (N contacts for each account) during the importing process we will associate contacts and accounts.

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