

## Clean Contacts – Import Workspace

<i>Speech</i>	<i>Cursor Actions</i>
This video, explains how to clean up a spreadsheet of contact information to prepare for importing it into your Sumac database.	
If you have a spreadsheet full of contact information, like names and addresses, you can use Sumac to validate that information. Sumac does not allow you to import incorrect information, so you must clean up and validate the data before importing it into Sumac.	Show Console. Open spreadsheet.
Start by saving the spreadsheet as a tab-delimited file, which is a .txt file.	Save spreadsheet as .txt. Click No.
Now you can use Sumac to clean up the file. In Sumac, click Utilities, Import, and Import Workspace, which is the tool used for cleaning up and validating data before importing it into the database.	Expand Utilities. Expand Import. Click Import Workspace.
Choose the file, and click OK.	Choose .txt file. Click OK.
Start by specifying the number of header rows in your spreadsheet. This spreadsheet uses only 1 row for the header, so choose “1” from the Header Rows drop-down menu.	Choose 1 header row.
You'll notice that Sumac greyed out the information in the first row to indicate that it is the header.	Highlight the grey text in first row.
Notice that the first name and last name for these contacts are all in the same column. Since those are 2 separate fields in Sumac, you need to split them apart.	Highlight Name column.
Start by selecting the name column.	Select Name column.
Then click “Split Columns.”	Click Split Columns.
Enter the character that separates the data in this column. In this spreadsheet, the first and last names are separated by a comma, so enter a comma, and click OK.	Enter comma. Click OK.
Sumac asks which comma you want to split on. Since there is only one comma splitting information in this column, choose first one only.	Choose first one only. Click OK.
Sumac splits the column so the first and last name are separated.	Point to 2 separate columns.
Since Last name is the only mandatory field in a contact record, each contact you're importing <i>must</i> have a last name.	
To make sure that they all have a last name, select the Last Name column and click Sort.	Select Last Name.

Sumac sorts all contacts without a last name to the top of this spreadsheet.	Click Sort.
If there is no other information about these contacts in the spreadsheet, delete these rows. But if there is other information, like an email address for example.	Delete empty rows.
Enter a last name like “[unknown]” for these contacts, so you can still add their email addresses to your database for mailings.	Enter Unknown.
To do this quickly for several contacts at once, type [unknown] into the Last Name field of the first contact in the list, then select the last name column.	Select Last Name column.
Click the Multi Fill Down button to fill in the same information for the other contacts with no last name in this spreadsheet.	Click Multi Fill Down.
Now you should validate their address information. Select the Residence Street column, then click “Apartment Numbers” to put any apartment or suite numbers in a separate column.	Select Residence Street. Click Apartment Numbers.
Sumac also understands several countries postal code formats, so you can validate these contacts postal codes to make sure they're in the correct format.	
Select the postal code column.	Select postal code.
And under the Validate drop-down menu, choose Postal Code (Validate).	Choose Postal Code Validate.
If Sumac finds any errors in the postal codes, it highlights the row in which the error occurred.	Point to highlighted row.
You can fix this postal code by manually editing it.	
Or by selecting the postal code column again, and opening the Validate drop-down menu. Choose Postal Code (Repair).	Select postal code column. Choose Postal Code Repair.
Sumac asks you to identify the column that contains the country, since it can do a better job of validating postal codes if it knows a country. If the country isn't a column in your spreadsheet, just click OK.	Choose appropriate country column. Click OK.
Sumac then proposes an appropriate solution to fix this postal code. Click Yes to accept Sumac's solution.	Click Yes.
To validate phone numbers, select the phone number column, then click Phone numbers.	Select phone column. Click Phone Numbers.
Specify a default 3-digit area code that Sumac can use if it finds any numbers expressed as only 7-digits, and click OK.	Type 555. Click OK.
Sumac automatically validates all phone numbers, fixing any that were only expressed as 7-digits. It also separates any extension numbers into a separate column.	Highlight 555 number. Highlight Extension column.
To validate email addresses, select the email field and choose Email (Correct Format) from the Validate drop-down menu.	Select Email column. Choose Email (Correct Format).

Sumac validates the email addresses.	
If it finds errors in any email address, Sumac highlights the bad rows so you can make corrections.	Click OK. Point to highlighted row.
Click Show Only Selected to show only the selected, incorrect, rows.	Click Show Only Selected.
Fix the invalid email addresses,	Edit email addresses.
then click Show All.	Click Show All.
You can also validate email addresses to make sure that they are not already in your database.	
Select the email column and choose Validate Not Duplicate from the Validate drop-down menu.	Select Email (Correct Format) column. Choose Email (Not Duplicate).
Sumac selects any rows with duplicate email addresses. The last column in this spreadsheet is the contact birth date. Sumac can also validate dates.	
Select the date column and open the validate drop-down menu. Select that you want to validate dates.	Select the Date column. Choose Dates.
Sumac can routinely handle most common date formats based on settings on your computer. Click OK.	Click OK.
Sumac validates the dates and re-formats them into the international standard year month day format.	
Now that our spreadsheet has been cleaned, we need to save the work we've done before we can import this into the database. Click Save As.	Click Save As.
To save the cleaned spreadsheet, make sure you use a file name that allows you to differentiate between your original spreadsheet and the one that has been cleaned. Sumac automatically proposes a file name that is the same as the original, but with an increasing number on the end of the name. Then click Save.	Click Save.
You can now move on to importing this list of contacts into your Sumac database.	
<i>Check out more training videos to learn how to import contacts into your database, or to learn more about Sumac.</i>	