

Importing – Importing Contacts

<i>Speech</i>	<i>Cursor Actions</i>
<p>You may have data in different places – spreadsheets, or perhaps other databases.</p> <p>You may have gathered a list of people who attended an event and put them in a spreadsheet, or perhaps you received a list of donations from some other source.</p> <p>Sumac can manage these and many other types of data, and it is really convenient to get it together in one place.</p>	
Regardless of the type or source of the data, you can import it into your Sumac database.	Show console.
Before importing your spreadsheet, it is important that you clean up the data. Use Sumac's Import Workspace to do this.	Expand Utilities. Point to Import Workspace
Only certain users are allowed to import data. If you are going to import data, your Sumac administrator must give you the Bulk Import capability in your user profile.	
After cleaning up your spreadsheet, Click Utilities, Import, and Import.	Click Import.
Indicate that you are importing contacts,	Choose Contacts.
and that they are new.	Choose Add New records.
Choose the date file,	Choose data file.
and click OK.	Click OK.
The data File appears on the right hand side. You must tell Sumac which contact record fields should hold which data.	Point to Data File.
The left hand side of the window holds a list of all the fields in contact records.	Point to Fields Available.
You match field names to data columns by dragging field names and dropping them onto the data columns.	Drag and drop Field name into columns.
Once all the contact columns have been matched, you must check the data before you can import it.	
Click “Check Before Import” to tell Sumac to check all the data. Sumac checks every row in every column to make sure that the data is correct.	Click Check Before Import. Click OK.
If something is wrong, perhaps an email address that is incorrectly formatted, then Sumac highlights the incorrect cell and puts an error message at the start of the row.	Highlight data in the first row. Highlight “contains error.”
At this point, you may choose to stop the import, fix up the original file, and try again. Before you do this, you should Save Column	

Choices to save the list of column selections;	
later when you import again, you can save some time by clicking Load Column Choices.	Highlight Load Column Choices button.
Alternatively, if there appears to be something wrong with an entire column, you can click to select the column, then click Clear Column Title to tell Sumac to not import that column.	Highlight Clear Column Title button.
Alternatively, you can click to just ignore this single row of data in the incoming file.	Click to exclude the bad first row.
Then click Import.	Click Import.
All the contact records are imported into Sumac. They turn from black to green to indicate successful importing.	Click OK.
If you now look at the contacts list, you see that the newly imported contacts have been added to the end of the list.	Close window. Click Contacts. Show newly imported contacts at the end of the list.
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