gold-vision®

Guide to Importing Data

CONTENTS

INTRODUCTION

DATA IMPORT INTRODUCTION

The Gold-Vision Import Client (GVIC) is a Windows Forms application that enables Gold-Vision data administrators to import large quantities of data into their Gold-Vision system. It has been designed to assist with both initial setup of Gold-Vision, and ongoing updates to the Gold-Vision database.
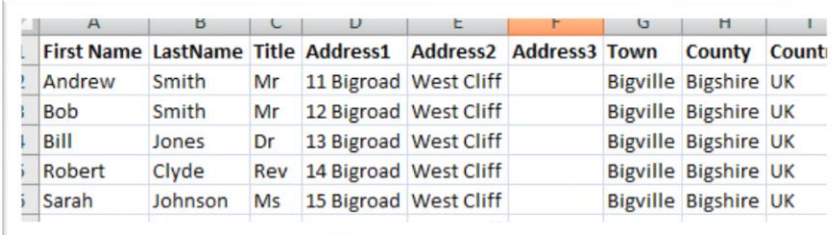
WHO SHOULD USE THE GOLD-VISION IMPORT CLIENT?

Anyone who is intending to import large amounts of data into Gold-Vision should use the Gold-Vision Import Client; however, this tool should be regarded as a systems administrator only application due to the potential risks involved with data imports. They should also be familiar with editing spreadsheets and/or CSV data files and have a clear understanding of how records may be uniquely identified.

You must have access to the data section of the main Gold-Vision Administration Console to run the GVIC. See your Gold-Vision Administrator for more details.

PREPARE YOUR DATA

Following these steps will ensure there are fewer errors in the files which are returned to you.

Prepare your file as follows:

First Name	LastName	Title	Address1	Address2	Address3	Town	County	Count
Andrew	Smith	Mr	11 Bigroad	West Cliff		Bigville	Bigshire	UK
Bob	Smith	Mr	12 Bigroad	West Cliff		Bigville	Bigshire	UK
Bill	Jones	Dr	13 Bigroad	West Cliff		Bigville	Bigshire	UK
Robert	Clyde	Rev	14 Bigroad	West Cliff		Bigville	Bigshire	UK
Sarah	Johnson	Ms	15 Bigroad	West Cliff		Bigville	Bigshire	UK

- The first row is a header row that describes the data contained in each column.
- The second row, and each subsequent row contains a single record to be imported.
- Remove special characters from headers
- Make sure the header name doesn't start with a number
- Ensure that each record has a company name at minimum
- Try to head the columns in your spread sheets the same as those in your Gold-Vision database.
- If there are columns in your spreadsheet which you are not worried about importing – delete and remove them before saving. Also remove any blank columns.
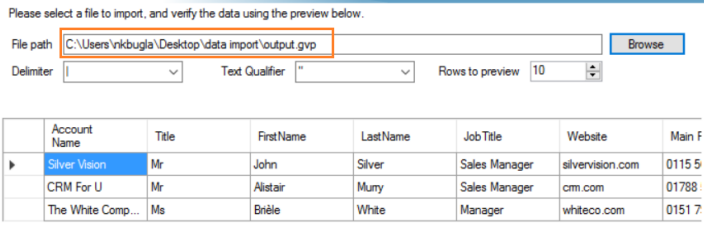- There should only be one worksheet in the Excel workbook

Check your data for commas

The most common file type imported is a .csv created from Excel. If commas are present in the file, this will prevent the data import working as these will be seen as delimiters (characters marking the end of a field).

- In Excel, CTRL + F to open the Find window
- Find commas
- If you have commas present, use Replace to clear them or convert the file (see below)

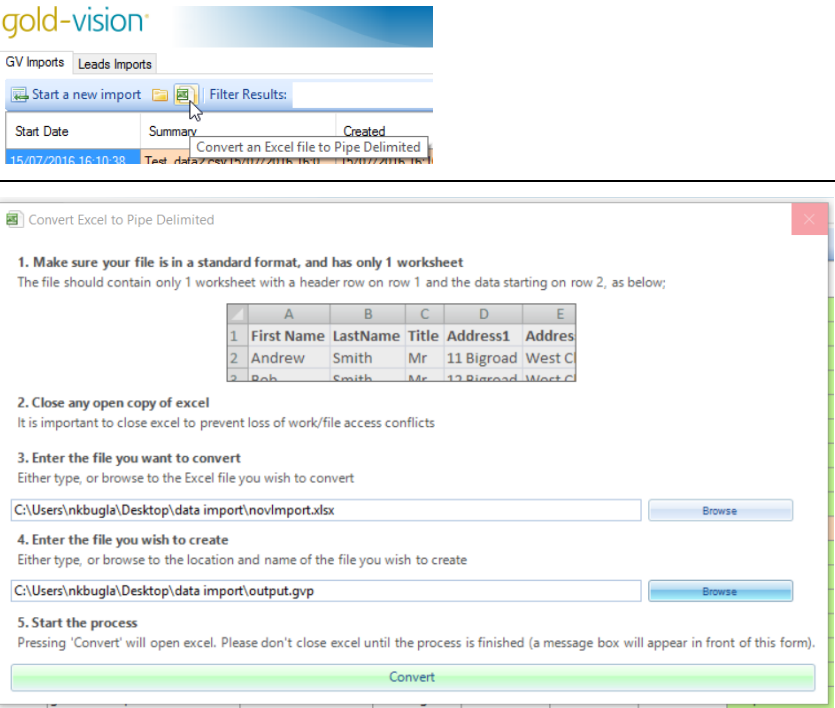## Do you need to keep the commas? Convert your Excel data to a text file

Your file is now available to select	Please select a file to import, and verify the data using the preview below. File path: C:\Users\nkbugla\Desktop\data import\output.gvp [Browse] Delimiter: | Text Qualifier: " Rows to preview: 10 <table><tr><th>Account Name</th><th>Title</th><th>FirstName</th><th>LastName</th><th>JobTitle</th><th>Website</th><th>Main F</th></tr><tr><td>Silver Vision</td><td>Mr</td><td>John</td><td>Silver</td><td>Sales Manager</td><td>silvervision.com</td><td>0115 5</td></tr><tr><td>CRM For U</td><td>Mr</td><td>Alistair</td><td>Murry</td><td>Sales Manager</td><td>crm.com</td><td>01788</td></tr><tr><td>The White Comp...</td><td>Ms</td><td>Briéle</td><td>White</td><td>Manager</td><td>whiteco.com</td><td>0151 7</td></tr></table>

If your data has commas and you don't want to remove them (because they're needed), use the in-built tool to convert your Excel file to a pipe delimited text file.

Access this tool from the import wizard.	gold-vision GV Imports Leads Imports Start a new import Filter Results: Start Date Summary Created 15/07/2016 16:10:38 Test data2 csv Convert an Excel file to Pipe Delimited
Browse to the location of your Excel data and then use the same location for the file you want to create. Note the default ending is **.gvp** **Click Convert**	**Convert Excel to Pipe Delimited** **1. Make sure your file is in a standard format, and has only 1 worksheet** The file should contain only 1 worksheet with a header row on row 1 and the data starting on row 2, as below; <table><tr><th></th><th>A</th><th>B</th><th>C</th><th>D</th><th>E</th></tr><tr><td>1</td><td>First Name</td><td>LastName</td><td>Title</td><td>Address1</td><td>Addres</td></tr><tr><td>2</td><td>Andrew</td><td>Smith</td><td>Mr</td><td>11 Bigroad</td><td>West C</td></tr><tr><td>3</td><td>Bob</td><td>Smith</td><td>Mr</td><td>12 Bigroad</td><td>West C</td></tr></table> **2. Close any open copy of excel** It is important to close excel to prevent loss of work/file access conflicts **3. Enter the file you want to convert** Either type, or browse to the Excel file you wish to convert C:\Users\nkbugla\Desktop\data import\novImport.xlsx [Browse] **4. Enter the file you wish to create** Either type, or browse to the location and name of the file you wish to create C:\Users\nkbugla\Desktop\data import\output.gvp [Browse] **5. Start the process** Pressing 'Convert' will open excel. Please don't close excel until the process is finished (a message box will appear in front of this form). [Convert]

Does your data contain Unicode characters?

If your data contains characters such as £ á Á é É í ó ü ß you will also need to convert your file as above. If not, you will see the following characters:

Please select a file to import, and verify the data using the preview below.

File path: C:\Users\nkbugla\Desktop\data import\novImport.csv   [Browse]
Delimiter: ,   Text Qualifier: "   Rows to preview: 10

	Town/City	County/State	Post/ZipCode	Country	Value	Industry	Region
▶	Nottingham	Krak◆w	NG1 4PP	United Kingdom	◆1,000	Information Tech...	Midland
	West Haddon	B?dzin	NN9 4TP	United Kingdom	◆4,500	CRM	Midland

Does your data contain dates?	Dates should be in the format YYYY/MM/DD 2016/12/01 (DD/MM/YYYY also works, but the above is the preferred format)
Address Fields	Ensure address fields are not all in one cell with carriage returns, they should be in individual fields eg Address 1, Address 2, Address 3
Spilt Contact Names	If First and last names have been stored together they should be in two columns Firstname and lastname. You can do this by using the text to columns functionality in Excel alternatively if this moves your data into multiple columns for a large portion of your data we may be able to assist with Excel functions which can be run over your data.
Account Managers / Users	Ensure that if you have names of Sales people or internal users who own the Company or Contact records that these names match users in Gold-Vision.
Drop Down Options.	Ensure that the drop down options in your spread sheet match those in Gold-Vision otherwise new drop down options will be added from the import or alternatively it is possible to choose not to add these options however this will cause the rows to error.
Notes	If importing Notes, there is a limit of 4000 characters. If more in the file, the line will error. Ensure line breaks and carriage returns have been removed
Make sure all your records contain the match keys – if not, split the file	Areas such as duplicate identity & match keys, considerations for data mapping and risk assessment need careful attention. If you are doing an Accounts and Contacts import you will need to ensure that all the **Accounts** have a match key (eg Account name and postcode) and all the **Contacts** have a match key (eg email address)
Check boxes	If you are trying to set Check boxes during the data import ensure that the value in your spread sheet is either set to **True** or **False**.

Check your data for line endings/carriage returns

If you've been viewing your data in Excel, there may be line endings (hard returns) hiding – especially in addresses. These will break your import as the tool uses these to know it's the end of the record.

This Excel file hides some hard returns that are invisible.

Account Name	Address1	Address2	Address3	Town	County	Postcode
Anytime Toys	Toy House	Toy Street		Towcester	Northamp	NN1 TOY
British Bears	Bear House	Bear Street	Growl Lane	Burnsley	Lancashire	BR1 GRR
Candy Canes	1 Sweet Street			Brighton	West Suss	CA1 NDY
Candy Canes	1 Sweet Street			Brighton	West Suss	CA1 NDY
The Crypt	Grave Lane	Scaryville		Haunting	Hampshir	OO0 OHH

Saved as a .csv file and opened with a text editor (like Notepad++) these become obvious.

```
Account Name,Address1,Address2,Address3,Town,County,Postcode,Country,1
Anytime Toys,Toy House,Toy Street,,Towcester,Northamptonshire,NN1 TOY,
British Bears,Bear House,Bear Street,Growl Lane,Burnsley,Lancashire,BF
Candy Canes,"1 Sweet Street[LF]
Sweetheart Lane[LF]
Sugarville",,,Brighton,West Sussex,CA1 NDY,United Kingdom,0111 101010,
Candy Canes,1 Sweet Street,,,Brighton,West Sussex,CA1 NDY,United Kingc
The Crypt,Grave Lane,Scaryville,,Haunting,Hampshire,OO0 OHH,United Kir
```

Going back to the Excel file, you can see the problem in the formula bar.

Note – using the Convertor will eliminate most of the unwanted characters, spaces and carriage returns.

Import some sample rows and save the field mappings

It's good practice to import a small number of sample rows (and check the results) before you embark on a new, large import.

When doing this, save the import definition – then if your sample import is perfect, you can import your full file. Of course, if the sample went in and your full file didn't, look at the steps above as there will be a data issue.

When you've mapped your fields, and chosen match keys, select Save. When you import your new data, select Load.
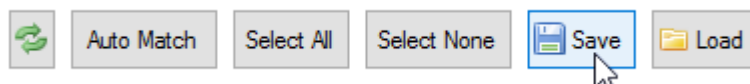
DOWNLOADING AND INSTALLING THE IMPORT CLIENT

The Gold-Vision Import Client (GVIC) can be downloaded from the Esteiro website using the link below. A link to this can also be found in your Gold-Vision administration console, under Data->Import.
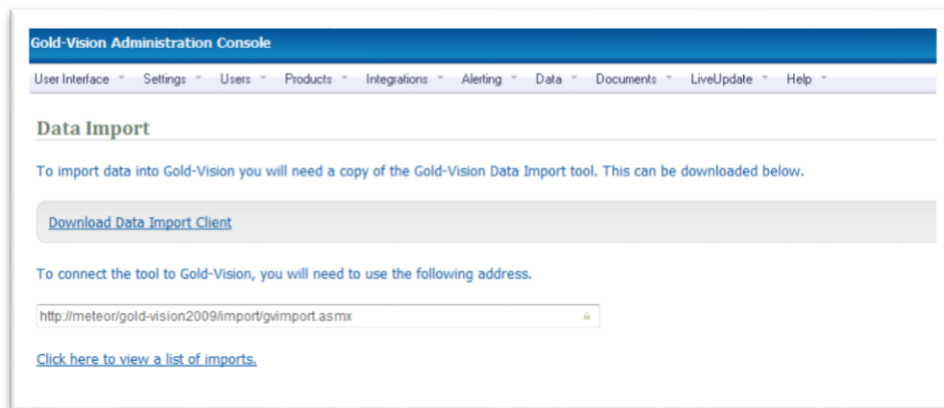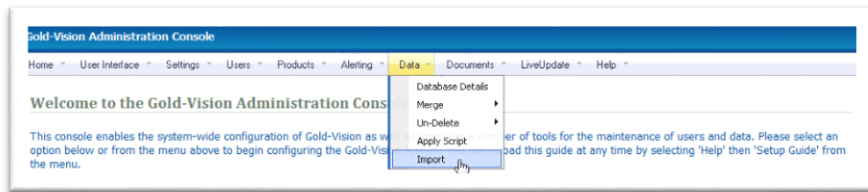

Gold-Vision Import Client Download - http://www.gold-vision.com/hotfix/ImportTool/setup.exe

The GVIC is distributed as a Microsoft 'Click-Once' application. For more information on Click-Once see: http://msdn.microsoft.com/en-us/library/ms996413.aspx

Prior to selecting Download Data Import Client, copy the address. You will need to paste this in Step 3 of the installation.

STEP ONE – GETTING THE CLIENT

If you haven't done so already, click on the link in your Gold-Vision Administration Console's import section (Data -> Import), or type the following into your web browser: http://www.gold-vision.com/hotfix/ImportTool/setup.exe. When you see the following dialog, click 'run';
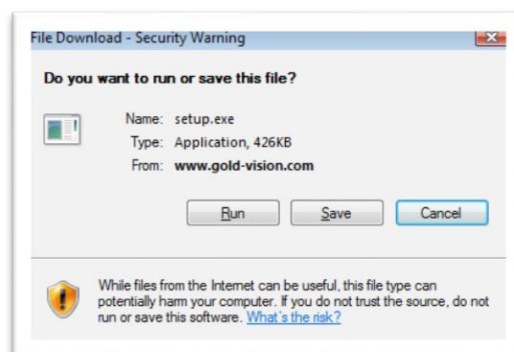
STEP TWO – RUNNING THE CLICK-ONCE INSTALLATION

Once you have finished downloading the setup file, you will be prompted with a security warning. Click 'Run', then Install
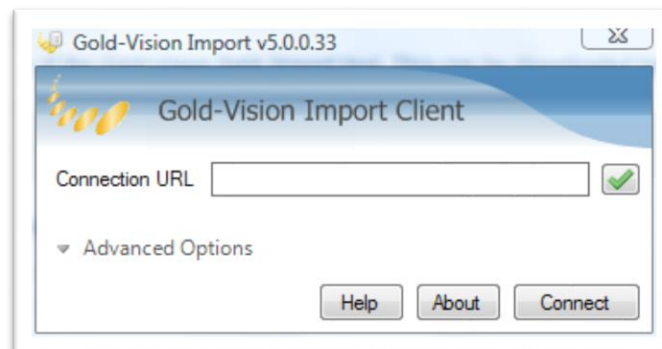

You will now see Click-Once contacting the Esteiro server, and downloading the client.
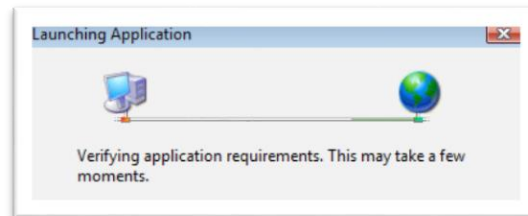
STEP THREE – CONNECTING TO THE IMPORT SERVICE

Once the installation has completed, the client will automatically launch. You will be prompted with the following dialog;

This is asking you where your Gold-Vision Import Service can be found. The format for this URL is usually as follows:

http:// <goldvision server name > / <gold-vision instance name> /import/gvimport.asmx

You can get the correct address for your server from the Administration Console under 'Data->Import'

Once you have entered the URL into the text box on the screen, click **Connect**. You should now be connected to the Import Service.

Note: If we host your Gold-Vision you will need to select Advanced Options, untick Connect as current user and enter your password
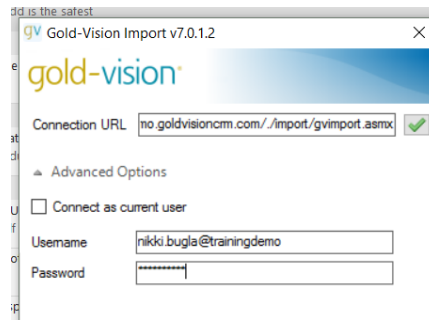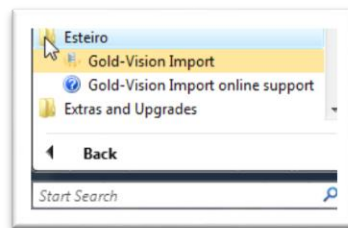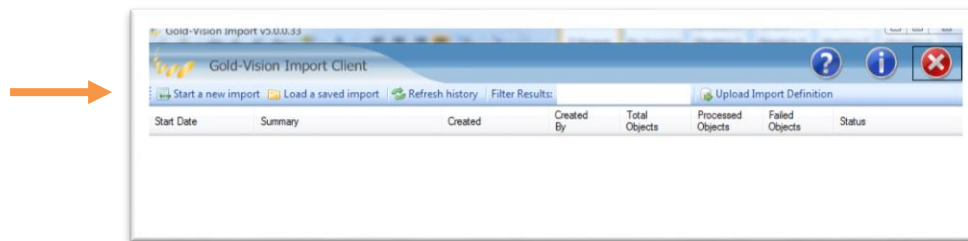

Help: opens this manual as a PDF

About: shows which version of the Import Client has been installed.

NOTE:

You only need to install this once. It is the accessed via the Start Menu: Esteiro/ GV Import

IMPORTING DATA

Above is the main screen for the import client. This screen gives you an overview of the recent import history, the facility to start the import wizard, the facility to load a previously saved import, and the facility to upload import definition files.

To start an import, click '**Start a new import'**, located in the top left corner of the screen. This starts the import wizard.
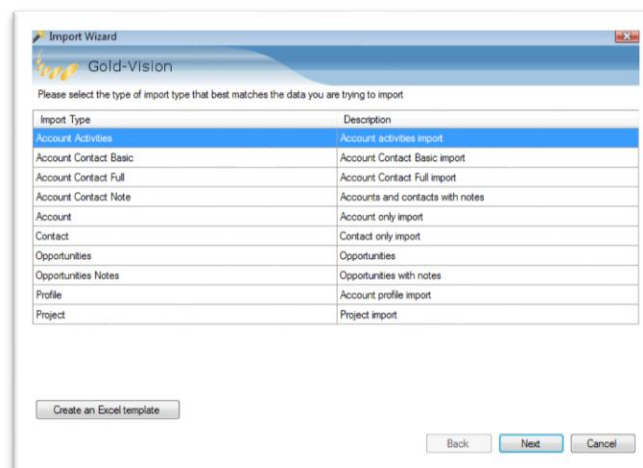
 Help: opens this manual as a PDF

 About: shows which version of the Import Client has been installed

THE IMPORT WIZARD

The import wizard allows you to configure the import to your exact requirements. It also gives you an idea of any difficulties the import service may encounter whilst processing your data.

IMPORT TYPE

This shows a list of available import specs. Select the type of import you want to use. You can add new import definitions through the interface accessible from the main screen. Click **Next**

Import Type	Description	Suggested match keys	Recommendations
Account Activities	Imports account activities, based on a small set of fields for matching accounts, plus all available account activity fields.	Account name or Reference/External ID. Activity summary or reference number.	
Account Contact Basic	Importing accounts and contact with only simple information. Does not include user defined fields in either object.	Account name or reference (plus postcode if required) + contact names or email address.	If not all rows have contact data, use a separate account and contact import (rows without contacts will be skipped).
Account Contact Full	Importing accounts and contact with full data. Includes all user defined fields in account and contact.	Account name or reference (plus postcode if required) + contact names or email address.	If not all rows have contact data, use a separate account and contact import (rows without contacts will be skipped).
Account Contact Note	Imports accounts and contacts with notes, or adding notes to existing contacts.	Account name or reference (plus postcode if required) + contact names or email address. Note summary or ID.	
Account	Importing accounts only.	Account name, reference (plus postcode if required).	
Contact	Adding contacts to existing accounts, based on a match to account information.	Account name or reference, plus contact names.	For data with multiple contacts per account or where some accounts have no contacts.
Opportunities	Adding opportunities to existing accounts.	Account name or reference plus opportunity reference (or name if unique).	
Opportunities Notes	Adding opportunities with notes, or adding notes to existing opportunities.	Account name or reference, opportunity reference, note summary.	
Profiles	Importing profiles to existing accounts.	Account name or reference, plus profile summary or unique reference.	
Project	Importing projects to existing accounts.	Account name or reference, plus project summary or unique reference.	

Create An Excel Template - You can also create excel templates of import definitions which will help with mapping your import data to fields in Gold-Vision.

FILE DETAILS
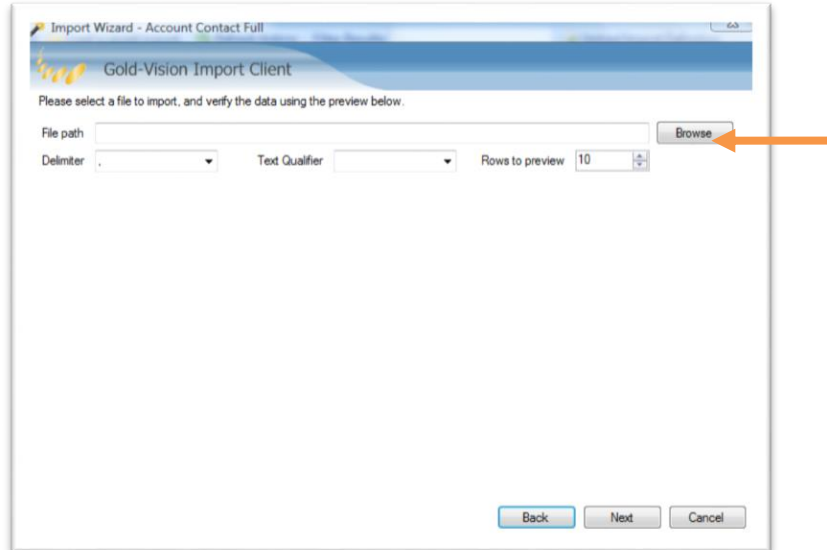
The file details screen allows you to select the file that contains your data for importing.

It is important to complete all of the fields correctly before proceeding.

- **File path** – The path to the file. You can click on the **browse** button to locate the file
- **Delimiter** – The character the file is delimited by, usually a comma (',') (this is the default character) or a pipe ('|')
- **Text Qualifier** – Allows the delimiter to exist by quoting text (i.e. bob,smith,"33, long road", Northampton)
- **Rows to preview** – Optional, changes the number of rows that are previewed
- **Click Next**
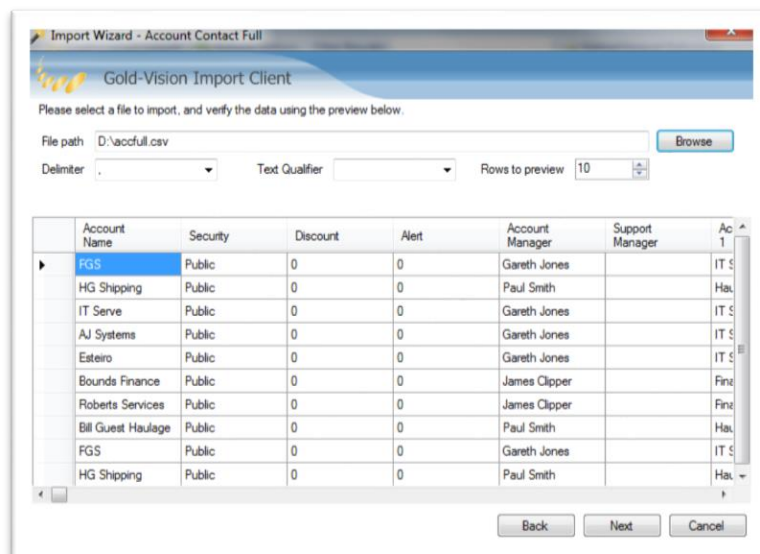
MAPPINGS
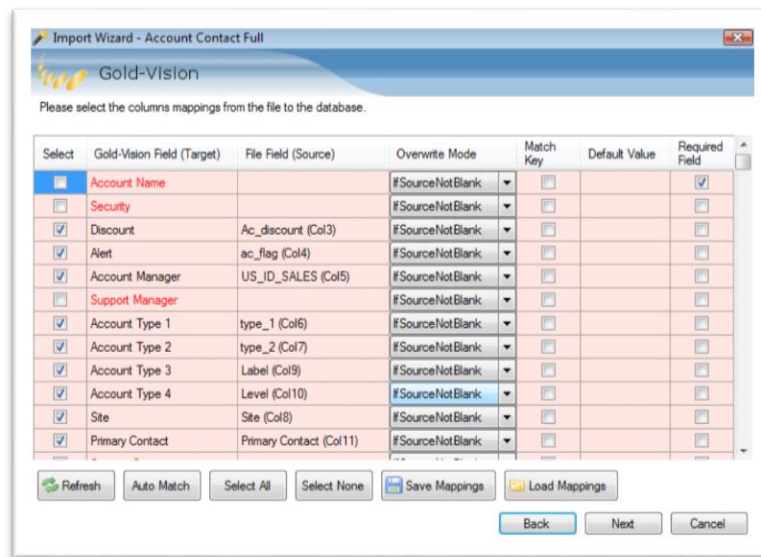
The mappings screen allows you to link the columns in the import data file, to the fields in your Gold-Vision. It also allows you to mark which fields can identify each object.

HEADINGS

- **Select** – This should be checked if you want to include the field in the import.
- **Gold-Vision Field (Target)** – The Gold-Vision column to import the data to.
- **File Field (Source)** – This enables you to select the column in the import file you wish to import by clicking in the File Field (Source box. If the file field is either blank or incorrect, you can click on the file field and select the correct field. You must also ensure that all of the required fields are mapped.
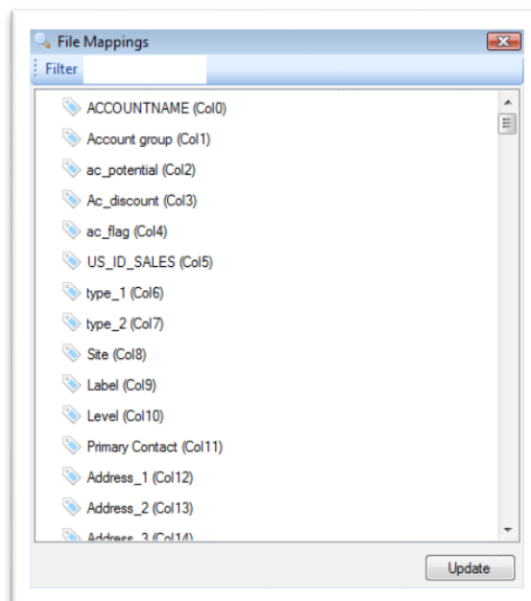
- **Overwrite Mode** – There are four options:
  - **Always** – always updates the column no matter what.
  - **IfSourceNotBlank** – updates only if the file field contains data.
  - **IfTargetBlank** – updates only if the Gold-Vision field doesn't contain data.
 - **Never** – Never updates, only adds.

Mode	Data in Gold-Vision	Data in import file	Gold-Vision data after import
Always	James	Bill	Bill
		Bill	Bill
	James		
IfSourceNotBlank	James	Bill	Bill
		Bill	Bill
	James		James
IfTargetBlank	James	Bill	James
		Bill	Bill
	James		James
Never	James	Bill	James
		Bill	
	James		James

- **Match Key -** The field is used to uniquely identify the object. For example, if Account Name and Postcode checked the import will search for the same Account name and postcode and if they are the same will assume they are a match and update the line. Each object is highlighted in a different colour, so be sure to look through the whole grid. I.E if you are importing Accounts AND Contacts, the Account fields will be highlighted in a different colour to that of the Contact fields. There is a limit of 5 match keys per object. **Please note** – drop downs cannot be used as a match key.
- **Default Value** – If the source is blank this value is used instead of nothing.
- **Required** – the field is a required field and is checked automatically according to the import spec and is READ-ONLY. You must ensure that the Select check box is ticked for the line. For example, if you have chosen to import Accounts and Contacts, then Account Name and Contact need to be checked in the Select box.

BUTTONS

- **Refresh** – reloads the fields from Gold-Vision and the file.
- **Auto-Match** – tries to match the files fields to the Gold-Vision fields.
- **Select All** – All fields are selected for import.
- **Select None** – No fields are selected for import.
- **Save Mappings** – Saves the currently configured mappings to a text file.
- **Load Mappings** – Loads previously saved mappings file.

Drop Downs
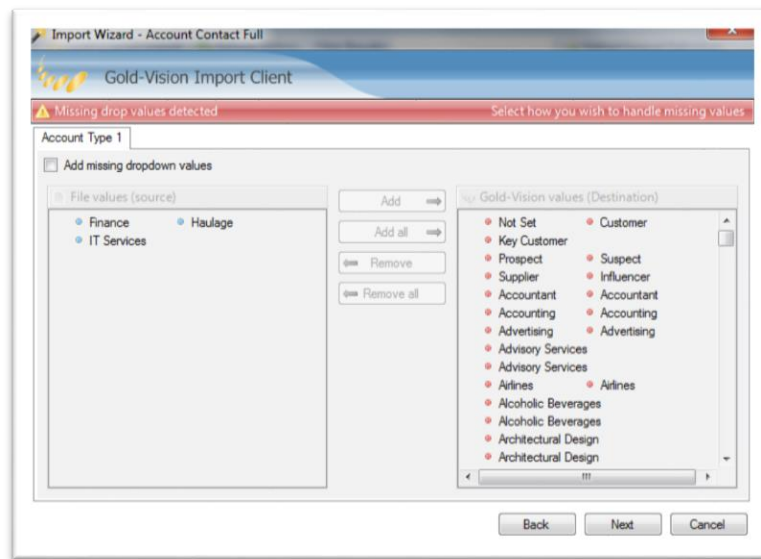
The Import tool will now check the drop down options in the import match those in your Gold-Vision.

This screen may take a few minutes to load. The drop down screen is only shown if there are errors in matching drop down values to Gold-Vision. For example, if there are Industry Sectors in the import which you do not have in your Gold-Vision.

Each tab represents a drop down field. The left hand pane shows values that are in the file, but not present in Gold-Vision. The right hand pane represents the fields that are present in Gold-Vision.

To add the missing fields, simply check the checkbox label '**Add missing dropdown values'** and drag the field from the left pane to the right pane.

Note: If you don't add the missing drop down values the row will fail to import.

Click **Next**.

Validation

The validation page is designed to give you an overview of possible problems with your data. It validates your data against possible data type problems, such as trying to pass the character "A" into an integer field (which only accepts numbers). This page will also show any fields from the file that haven't been mapped.

Copy Errors to Clipboard - for example you may wish to review the errors and amend the source file.
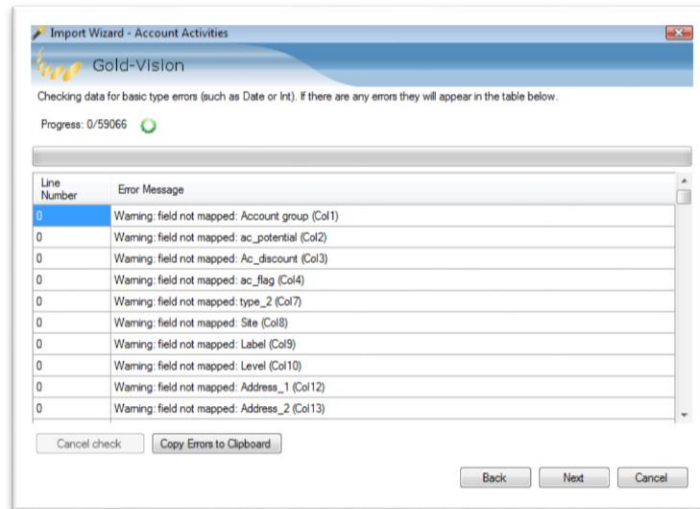
For example:

Field not mapped – click back to map the field

Field too long

Incorrect date format – used YYYY/MM/DD or DD/MM/YYYY

Line Number	Error Message
0	Warning: field not mapped: Post/ZipCode (Col13)
0	Warning: field not mapped: Value (Col19)
1	Warning: Length of column 21 is greater than 100. Depending on the mapping this can cause problems
1	The value '2016/25/03' is not recognised as a valid date

IMPORT SUMMARY

This is the last step before uploading the data to the server.
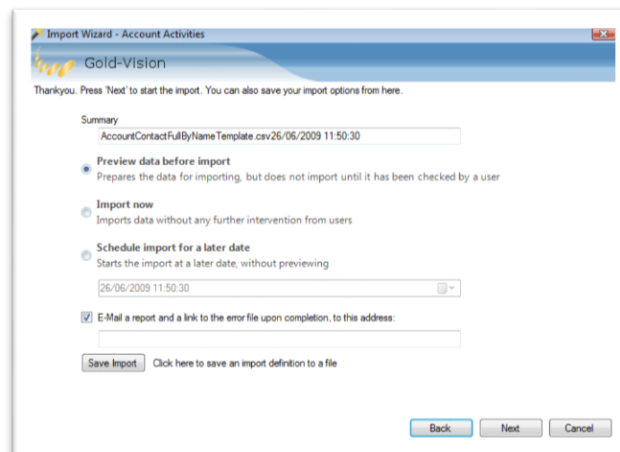
The import summary page allows you to enter a description of the import (for the log), the default summary will be the file name and the time and date of the import.

You can also add an email address field for entering an email address to send a report to, the option to save the import package to use later.

Select from the following options:

- **Preview data before import**. (**Recommended)** This option allows you to see any data that has been flagged as invalid (for example rows that require a match, but no match can be found). This will upload data to the database, search for matches, and then wait for further instructions.
- **Import Now**. This option follows the same initial steps as the previous one; however no further intervention from the user is required. The steps involved are; upload data to database, process matches, import data into Gold-Vision.
- **Schedule import for a later date**. This option will follow the same procedures as 'Import Now', however the import will not start until the specified time.

Save Import – Enables you to save the import to a file for future use. For example you may wish to import a small sample of your data and check it over before importing several thousand rows.

UPLOADING
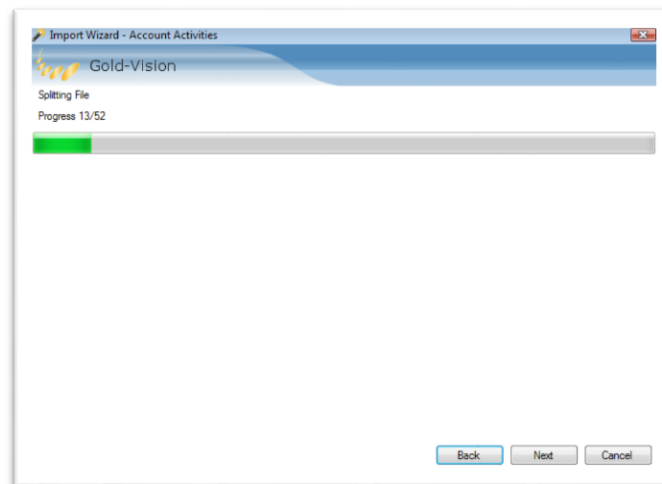
This screen is automated. The client will split the import file into 1Mb chucks, and upload the chucks to the webservice. The file is then joined together again on the server.
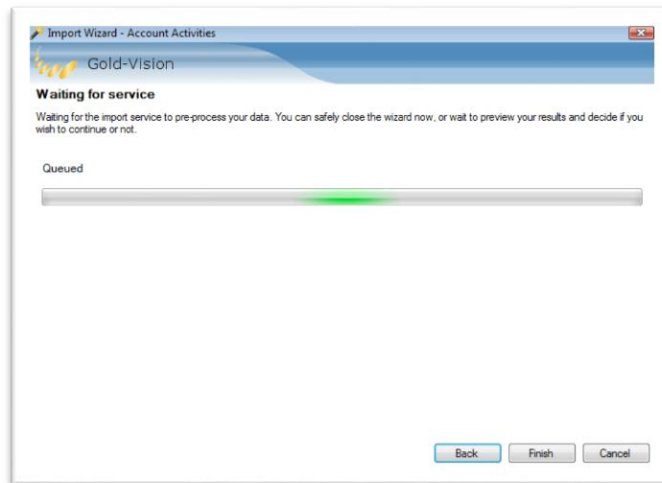
The next step (if you have chosen to preview your data) is to wait for the Gold-Vision Import Service to pick up the import. This will then perform the initial database upload, and match the keys against Gold-Vision data.

IMPORT PREVIEW
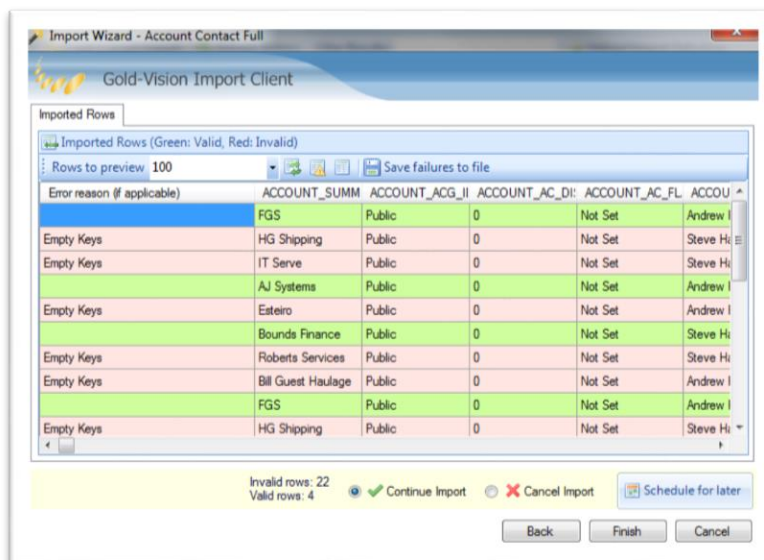
The import preview screen can be seen in the wizard, or from the main screen (if the import state is 'pending review') by double clicking the row.

Any rows that have failed will be highlighted in red, and the reason for the error will be placed in the first column. For example- Empty keys, duplicates or ambiguous matches. You can also schedule the import for a later time by clicking on the 'Schedule later' button.

If you are happy to continue, check that the 'continue import' option is selected and click **Finish**. If you want to cancel the import at this stage, select the **'Cancel import'** option and press finish.

The import will now process automatically. You can monitor the progress of the import from the main screen.

IMPORT DEFINITION UPLOAD

The import process requires pre-defined import definition files. These files are templates that tell the service how the import should behave. Occasionally new import definitions will become available, and older ones will require updating. To perform this maintenance, you should use the import clients upload facility,

You can access this functionality from the main GVIC screen;
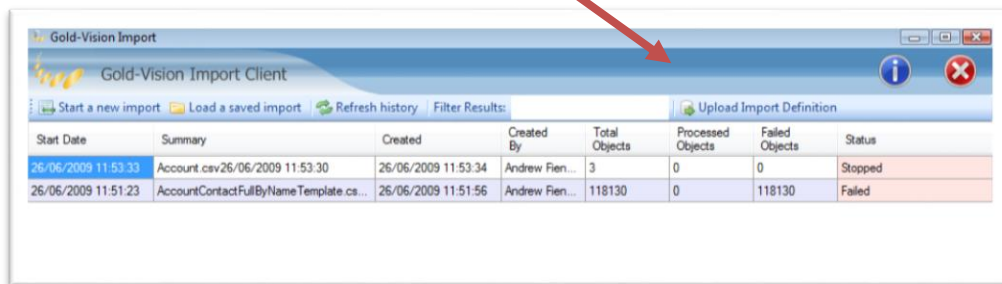
Clicking the 'Upload Import Definition' button brings up the following screen;
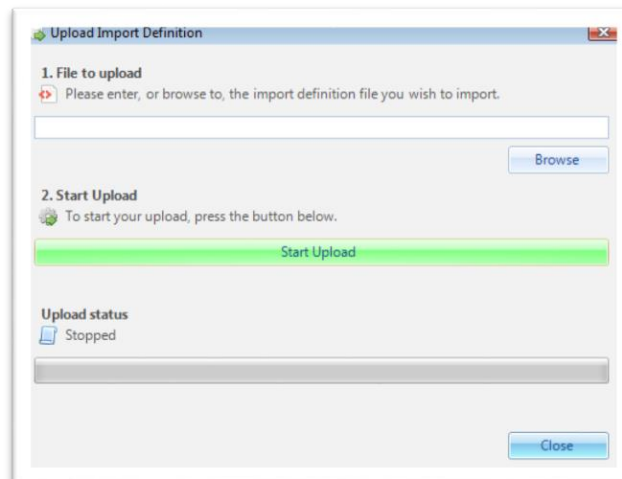
To upload the file, simply type the path to the file into the top text bow, or click the browse button to locate the file. Then click the large green 'Start Upload' button in the centre of the form. Once the upload is complete, click the close button.

TROUBLESHOOTING

The keys to importing data are:

1. Preparing your data – see above. Have you got data in the required fields eg if you are importing Accounts and Contacts, have you got Account Name/Summary and First Name/Last Name for every record?
2. If you have unusual characters, or line endings/carriage returns then convert your file using the built-in tool
3. Ensure you select the correct import type, see above
4. Ensure you have a match key for every item (e.g. Account and Contact import you will need to select a match key for the Account **and** for the Contact)
5. If you have checked all of the above and your import still fails, we recommend importing a small chunk of data, save the mappings. If the import is successful then import the next chunk, selecting the Load option on the Mappings page.

Please note:

To manage and view your imported Data into Gold-Vision use the Import Source field to filter on. You can bulk replace fields once the data is imported but note that this will remove the import source information so that it won't be filterable in future. You may want to copy the source into another text field or create a new source against accounts and contacts which you can copy this information into via the bulk replace facility.

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