

IMPORT UTILITY

For:

Total Support HelpDesk

Total Contacts & HelpDesk Solution

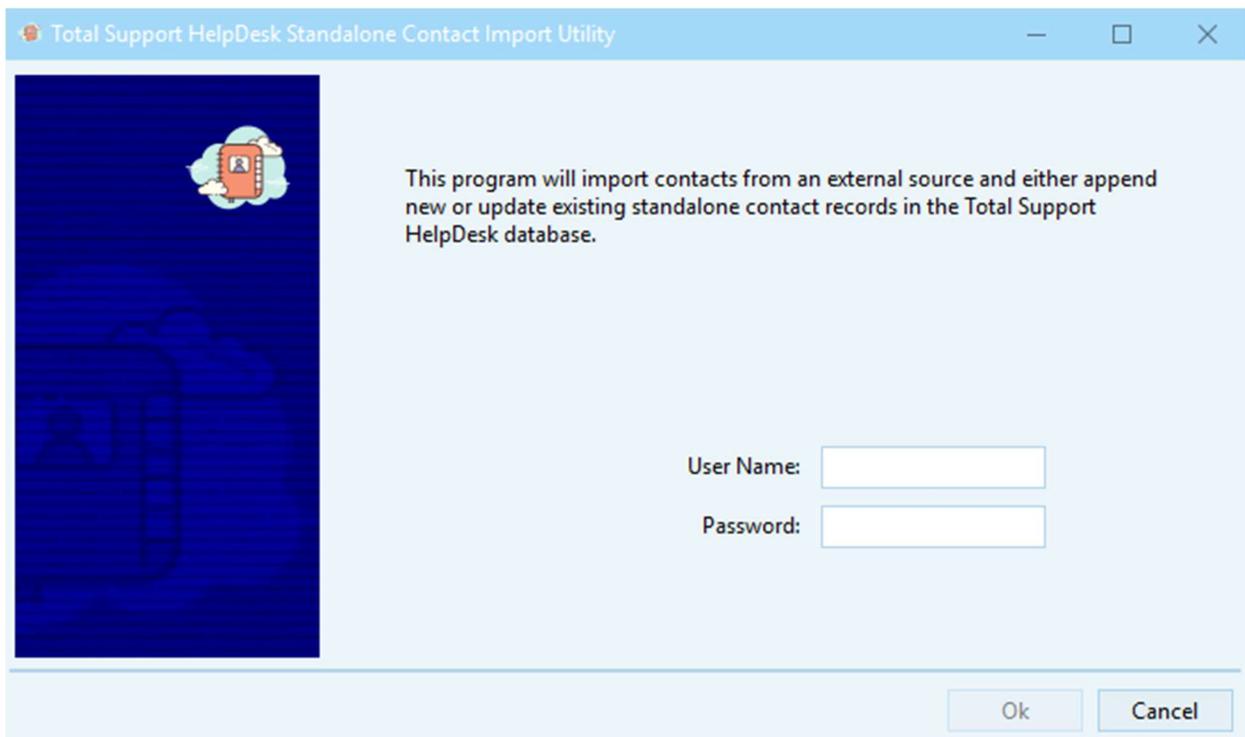
This is a very simply data import using a .csv file format. The import is a field-to-field method.

If you are just importing general contact information (company, contact, address, city, state, zip, phone, email) these fields are already created. **IMPORTANT**, you do need to go through the contact manager configuration process and if you are importing additional fields, you must first create these fields in the built-in contact manager so the data has a place to go when you map the field. Please see the Admin/Users guide, starting on page 6.

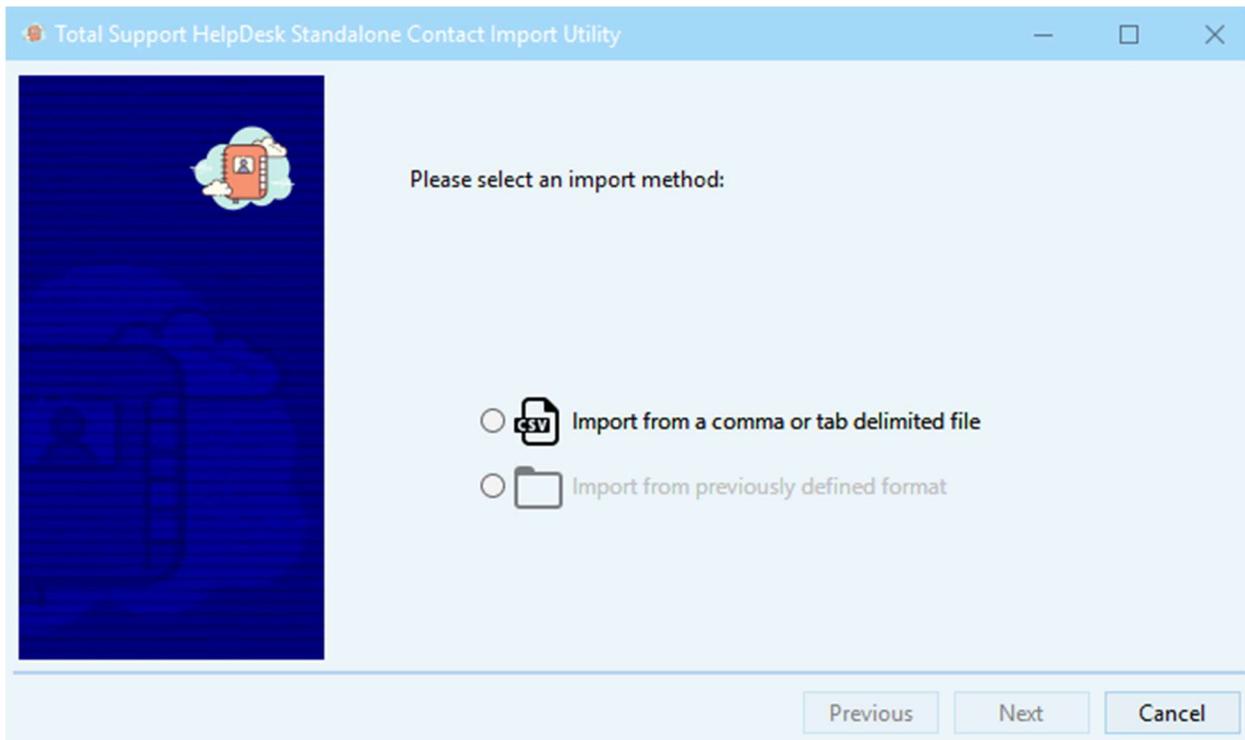
If you are back, then you must have completed the contact manager configuration.

Let's get started:

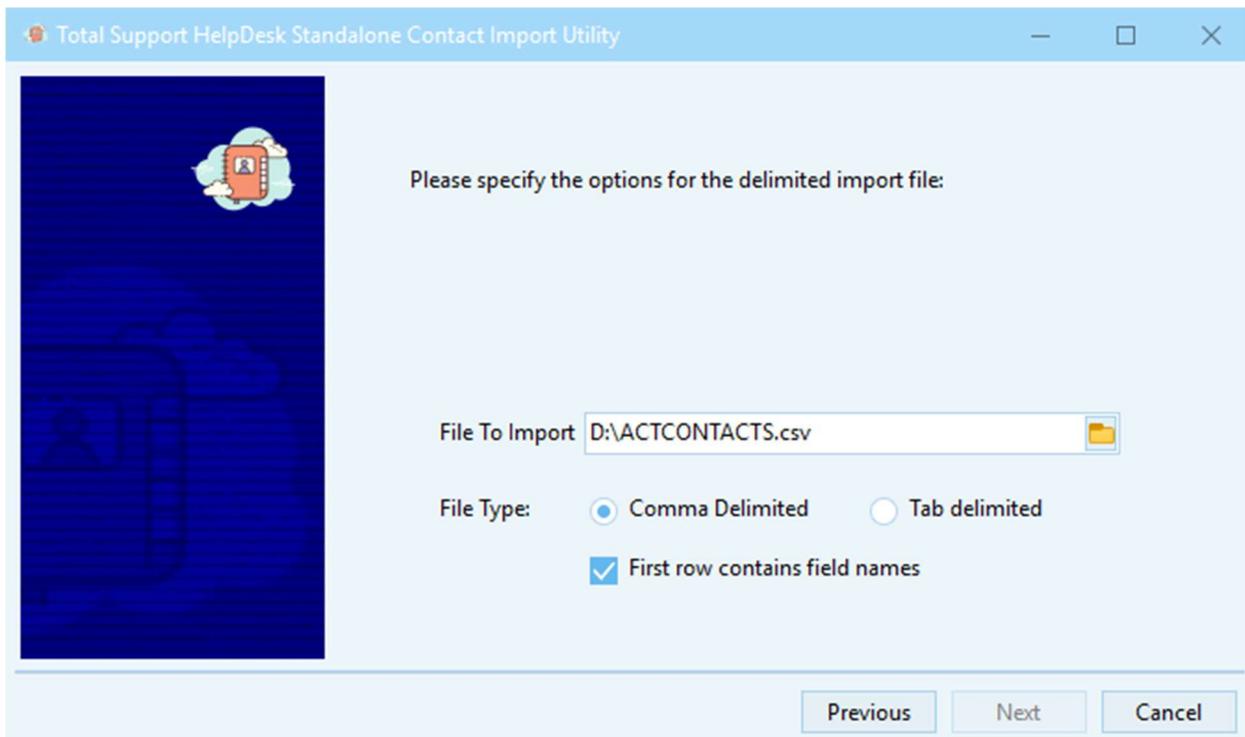
The TSHDIMPORT.exe may already be included in your \utils folder. If not, you can download it from our website <https://www.totalsupporthelpdesk.com> look for Contacts Import Utility



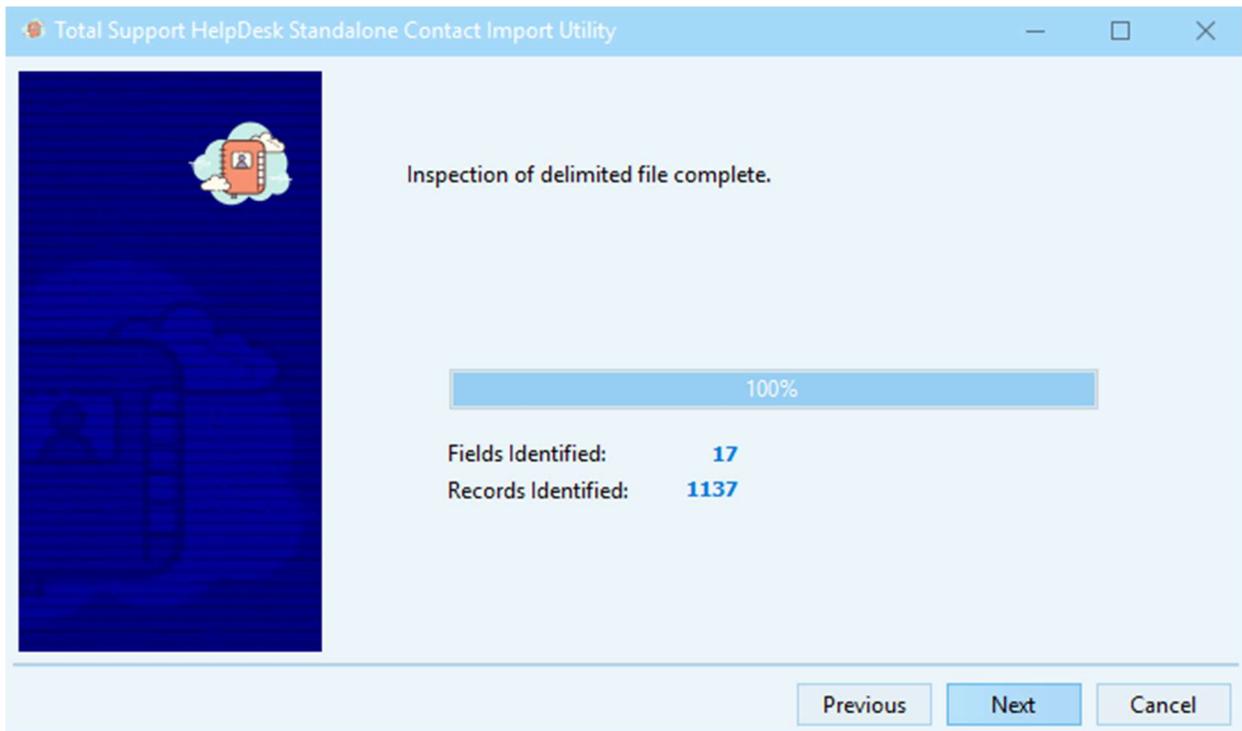
If you have not yet setup Users in the system, the default is ADMIN with no password.



The ONLY option you should use is the first option. Import from a comma or tab delimited file.



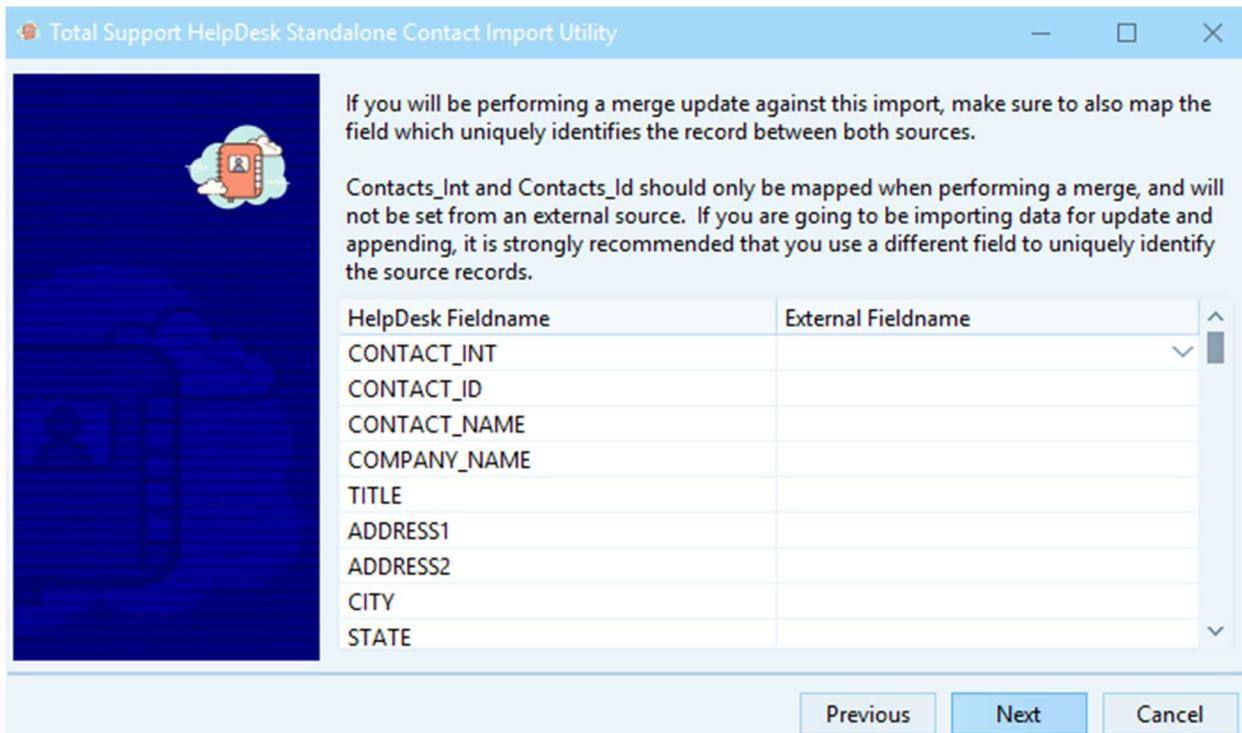
Once you have a valid location, select the file type, click the <next> button



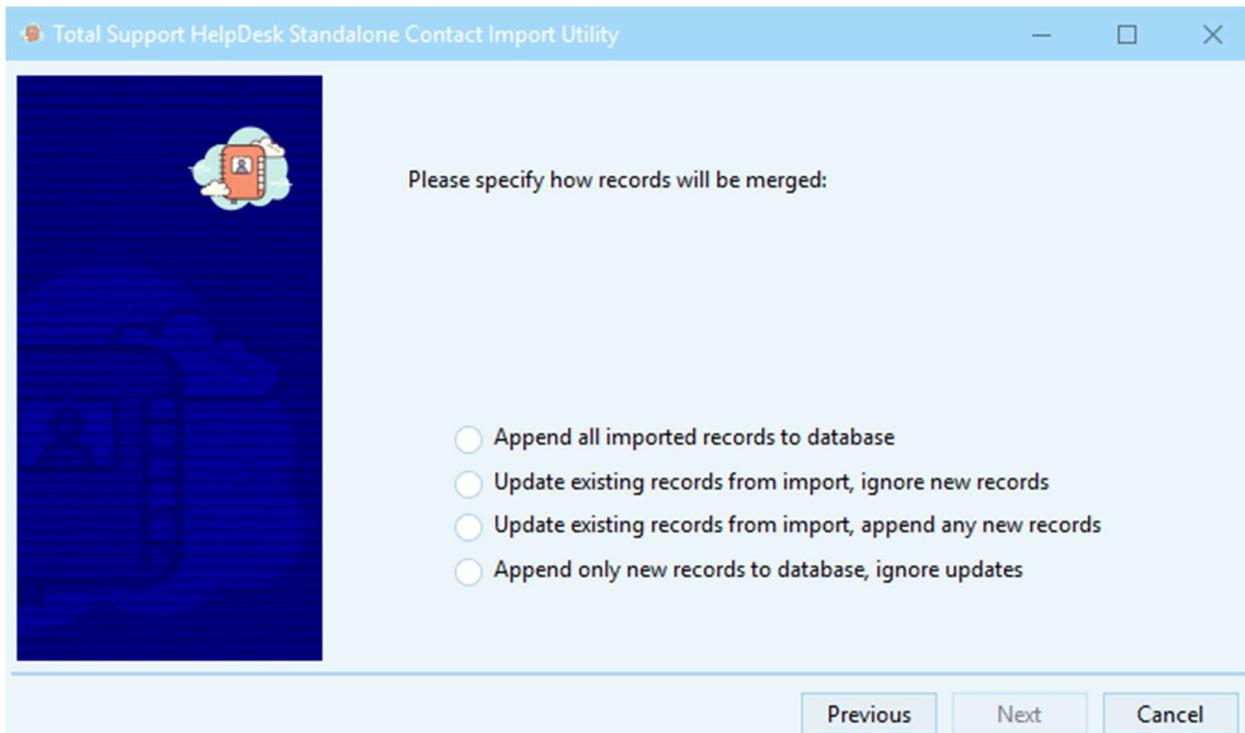
The utility will run through the file and identify how many fields and how many records.

TIP: If you have a slow processor on your computer and/or if you are running this over a network instead of local, we recommend that you break the import down into small batches.

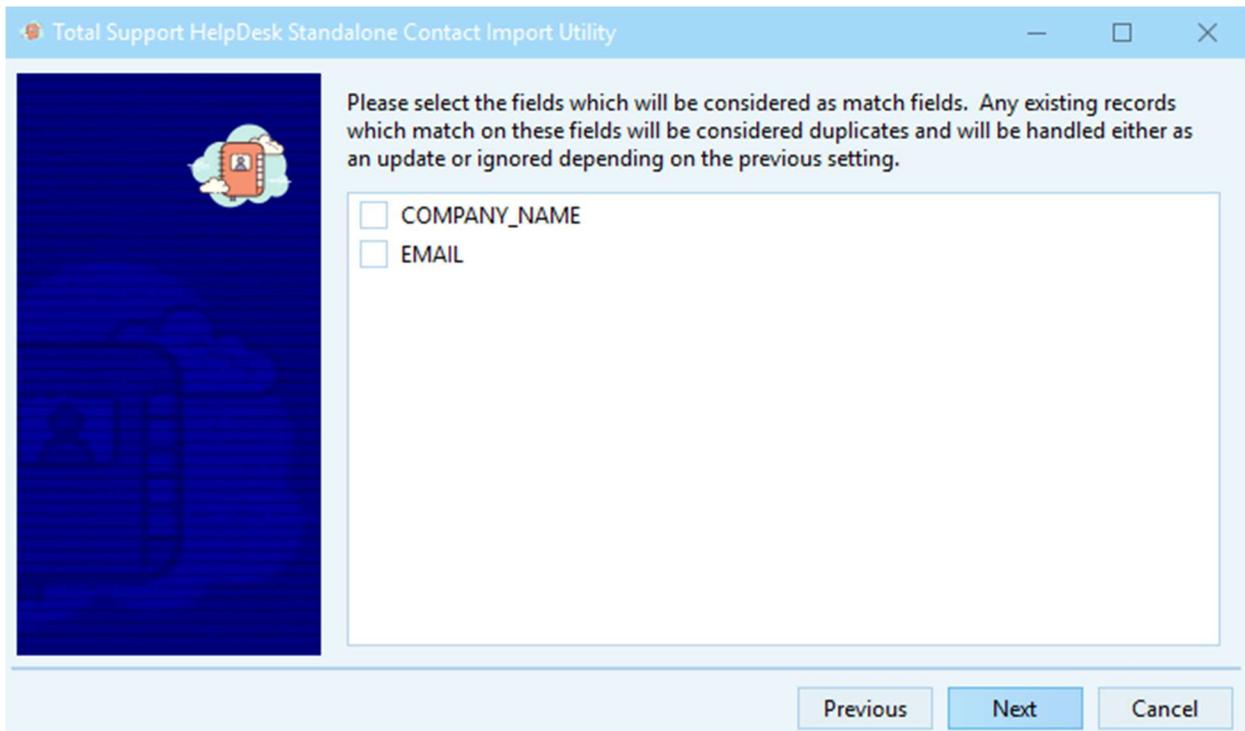
If you are ready to proceed, click the <next> button.



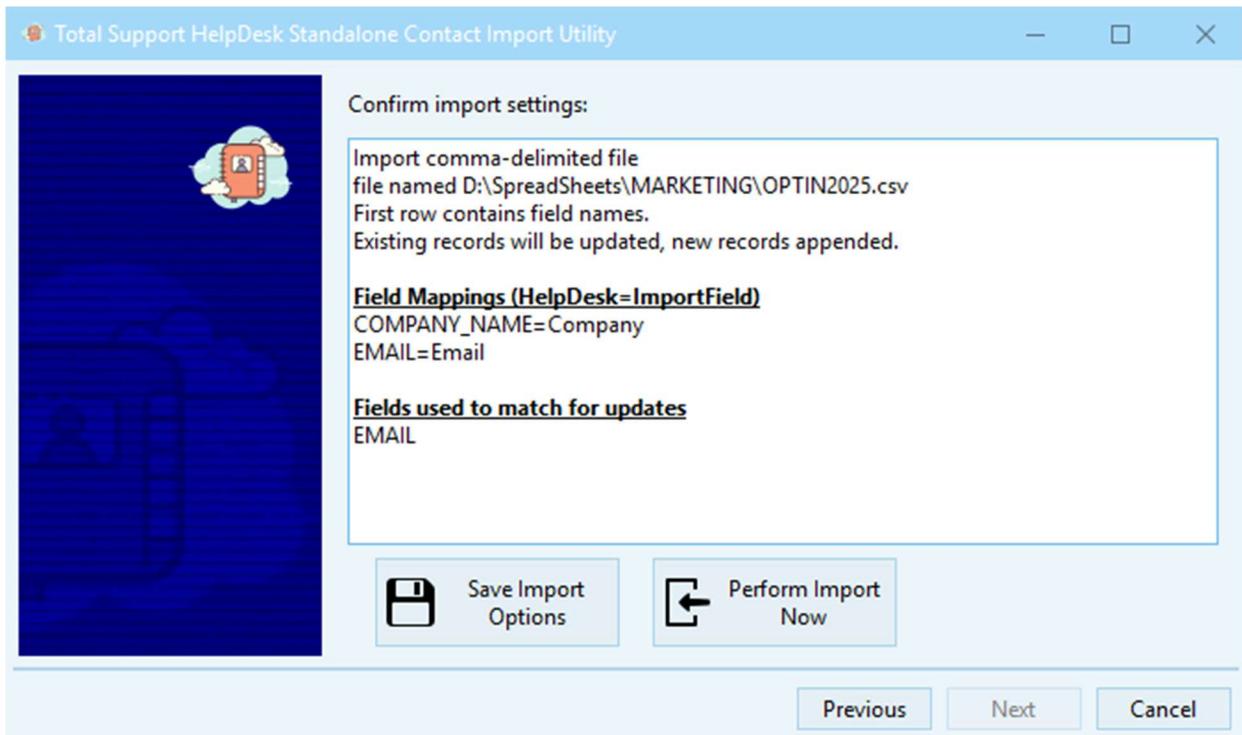
Here you will map the fields. Some fields will not be available to you as they are system fields. For example, the CONTACT_INT or CONTACT_ID. Just map your fields. Once you mapped all your fields click on <next>



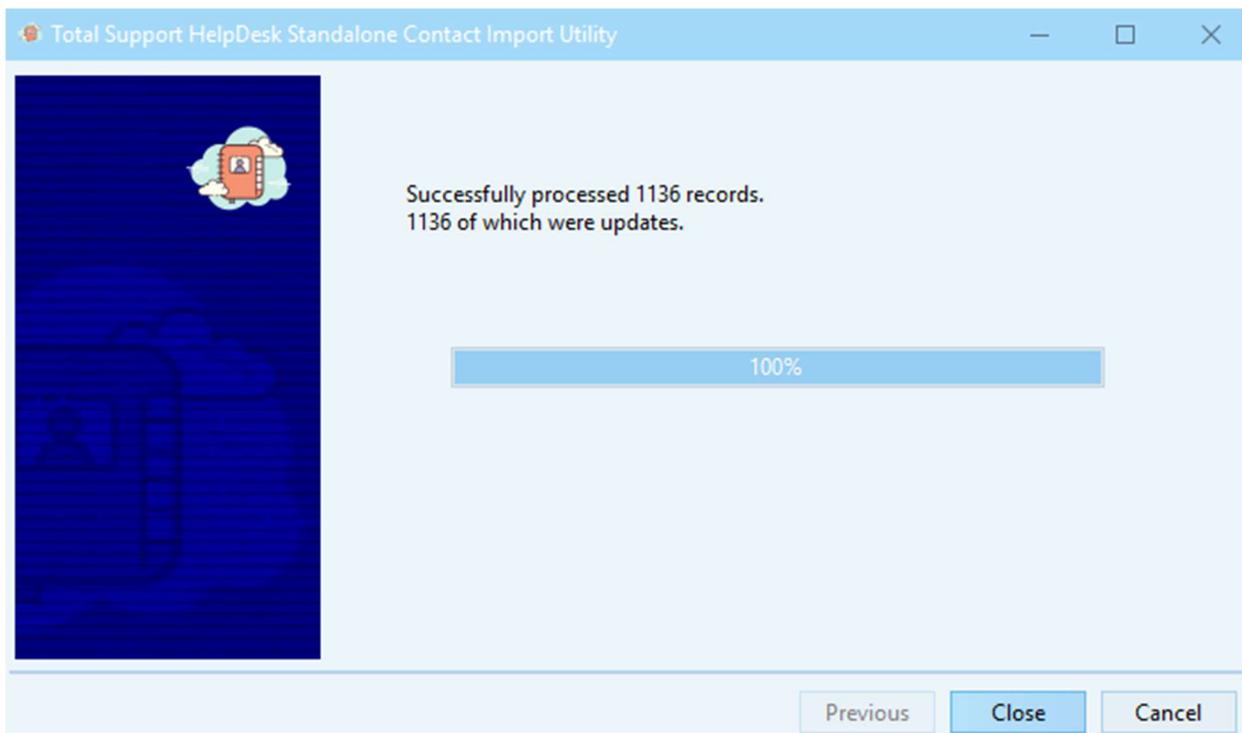
Here you will select how to merge the records to the database. If this is a first-time merge, you should select Append all imported records to database. Click <next> to continue.



Here is where you will select the unique identifier when importing and merging records. The most common is the Email Address. Your screen options may have more than what you see here in our example.



This is your confirmation screen before you start the import. When you are ready, click the Perform Import Now.



Once the bar hits 100%, and the message displays successful, you can click the <close> button.