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 <u>https://www.totalsupporthelpdesk.com</u> look for Contacts Import Utility

Total Support HelpDesk Standalon			—		×
	This program will import contacts from ar new or update existing standalone contact HelpDesk database.	n external sour records in th	ce and either e Total Suppo	append rt	
ALE]	User Name:				
	Password:				
			Ok	Cano	cel

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

Total Support HelpDesk Standalone Contact Import Utility	-		×
Please select an import method:			
Gen Import from a comma or tab delimited file Import from previously defined format			
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The ONLY option you should use is the first option. Import from a comma or tab delimited file.

Total Support HelpDesk Standalone Contact Import Utility	-		\times
Please specify the options for the delimited import file:			
File To Import D:\ACTCONTACTS.csv File Type: Comma Delimited Tab de First row contains field names	limited		
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Once you have a valid location, select the file type, click the <next> button

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Line and the second sec	nspection of delimited fi	le complete.				
		100%				
	Fields Identified: Records Identified:	17 1137				
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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.

Total Support HelpDesk Stan		-	· 🗆	\times
	If you will be performing a merge update ag field which uniquely identifies the record be Contacts_Int and Contacts_Id should only b not be set from an external source. If you a appending, it is strongly recommended that the source records.	gainst this import, make sure etween both sources. we mapped when performing re going to be importing dat t you use a different field to	e to also map t a merge, and ta for update a uniquely ident	he will nd tify
	HelpDesk Fieldname	External Fieldname		^
	CONTACT_INT		~	
	CONTACT_ID			
0	CONTACT_NAME			
	COMPANY_NAME			
	TITLE			
	ADDRESS1			
	ADDRESS2			
	CITY			
	STATE			\sim
		Previous Next	Canc	el

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.

Please select the fields which will be considered as match fields. Any existing records which match on these fields will be considered duplicates and will be handled either as an update or ignored depending on the previous setting.	Total Support HelpDesk Star		-		×
		Please select the fields which will be considered as match fie which match on these fields will be considered duplicates a an update or ignored depending on the previous setting.	elds. Any existing nd will be handle	g records ed either	as
	55	EMAIL			

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 then what you see here in our example.

Total Support HelpDesk Standalone Contact Import Utility	-		×
 Total Support HelpDesk Standalone Contact Import Utility Confirm import settings: Import comma-delimited file file named D:\SpreadSheets\MARKETING\OPTIN2025.csv First row contains field names. Existing records will be updated, new records appended. Field Mappings (HelpDesk=ImportField) COMPANY_NAME=Company EMAIL=Email Fields used to match for updates EMAIL MalL 			×
Previous	Next	Can	cel

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

Total Support HelpDesk Standal		—		×
	Successfully processed 1136 records. 1136 of which were updates.			
	100%			
OTH: T				
	Previous	Close	Can	cel

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