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Overview

This article walks through the steps to **import** a basic **contact** list from spreadsheet.

There are a few best practices along the way, but if you have any questions/concerns, or this if this is your first time importing please feel free to call our live tech support for assistance.

We also offer the additional services options where we can import a new list for you or append/refresh data such as an NCOA/CASS append.

Tip: Open a new session of your database prior to running an import, if the import goes awry it will be easier to <u>roll-it-back</u>. Also, make sure you set a **Source Attribute** during the import process which makes it easy to find the list you imported and verify the results, it's also beneficial if you bring in emails and need to send in a request for us to enable them for <u>mass email campaigns</u>.



<u>Steps</u>

First **prep** your spreadsheet and save it as a **.csv** file type. *My example is below with basic information related to contacts i.e. Address, Contact Info,* Attributes, and User Fields. You may end up brining a lot more or a lot less information than what I did in this example but most of the more common if is covered below with the appropriate column headers named in such a way that they will auto-map during the import.

Img 1 of 3 – Mapping a Contact Spreadsheet in Excel for Importing



Img 1 - Column Mapping for a Contact Import

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1 Title	LastName	FirstName 🚽	MiddleName	Suffix	Nickname	Street	Street2	City	State Zip	2	Zip4 Coun	try HomePhone	HomePhoneExt	t
2 Dr	Azuz	Geoffrey		Jr	Geof	11026 Xylon Ave N		Champlin	MN	55765	4327 US	993-555-1212	2	
3	Brackett	Ann Removing spaces in	Marie			1111 Elway St		St Paul	MN	55445	US			
4	Chandler	Pamela	Joy		Pam	11740 Texas Ave N	Apt 209	Champlin	MN	55444	US	993-555-1214	4	
5	Olson	Christopher the column headers	John			531 White Pine Way	Apt 308	Eagan	MN	55116	US			
6	Schifsky	Kathleen will make the fields	Jeanne			6037 Woodchuck Cir		Lino Lakes	MN	55110	US			114
7	Schriner	Andrew 'auto-map' during	R		Scooter	6301 84th Ct N		Brooklyn Park	MN	55110	US	993-555-1224	4 Don't call after	9
8 Mr	Stiyer	Darrel	L	Sr		9920 Briar Rd		Bloomington	MN	55110	US			
9	Welch	Daniel your import.	John			9959 Watsula Rd	Apt 322	Meadowlands	MN	55068	US	993-555-1220	5 Could be a bad	number
10		General Motors, Inc.				101 Big Car Rd		Detroit	MI	35101	US			
11		Organization to Make Life Better, LLC				905 Madison Blvd		Washington	DC	20201	US			
	-	Another Organization to Make Life Better				600 Washington St		Washington	DC	20201	US	993-555-1229		

Contacts where only the First Name is imported will automatically be categorized as a 'Company' in your database. e ability to bring in

You do have the ability to bring in two addresses during a single import i.e. Home & Work. In this example I only brought in one.

Img 2 of 3 – Mapping a Contact Spreadsheet in Excel for Importing



Img 2 - Contact Import from Excel

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1 BusPhone	BusPhoneExt	CellPhone	CellPhoneExt	Email	Altema	ail	BirthDate	Employer	Occupation	Jobtitle	Note	
2 996-555-1212		994-555-1212		primary-email1@domain.com	n email2	.email@email.cor	n 3/4/197	78 3M	Technician		long text and comment	s entered her
3			Call before 8pm.	primary.email2016@domain.	com		1/1/195	4 GMC	Accountant			
4 996-555-1214	x403		Don't call after 8pm.		<u>e-mail</u>	-2@email.com	4/20/198	88 General Mills	Account Exec	Senior VP of Sales	VIP Donor.	
5		994-555-1222		primaryEmail1@domain.com								
6	x412						12/11/199	90				
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8 996-555-1225	x414	994-555-1225										
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10												
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Img 3 of 3 – Mapping a Contact Spreadsheet in Excel for Importing



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Img 3 - Column Mapping for Contact Import from Excel

Take a look at the **Related Resources** section below for links to example spreadsheets to use as a starting point as well many other import related articles and videos to get help on correctly mapping your column headers.

Once your spreadsheet is prepped you'll need to save it as a .csv and close the file. In this example I called mine '2016-04-21-contact-list-for-trailblazer-from-sales-force.csv' as shown in the images below.

Img 1 – Save the Spreadsheet







Img 2 – Select a Location on your Machine to Save the File, Give it a Name, and Save it as a .csv File Type



Choose a location on your machine to save your file to, give it a name, and save it as a .csv file.

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 ★ Favorites ■ Desktop ● Temp ● Downloads ● Recent Places ■ Desktop ● Libraries ● jkristenson 	E	WinSnap Images Latest Compile SQL-Queries			10/18/2012 10:34 AM 6/18/2015 12:34 PM 1/12/2016 10:26 AM	File fold File fold File fold
Computer Network Control Panel Recycle Bin sales	and training	•				4
File name:	2016-04-21-contact-list-f	or-trail-blazer-from-sales-force.csv				-
	CSV (Comma delimited) (npanger	Tags: Add a tag	Title: Add a title	Su	ubject: Specify the subject	_
Alide Folders	2. Save it a file type wl		1. Give your spreadsheet file a name.	Tools 🔻	Save Canc	el
	supported for mass in	by Trail Blazer KNOWLI	EDGE BASE <u>www.trailblz.com/kb</u>		8 3	



Img 3 – Click [Yes] if Prompted when Saving as a .csv File Type

F	Microsoft Excel	
	 2016-04-21-contact-list-for-trail-blazer-from-sales-force.csv may contain features that are r To keep this format, which leaves out any incompatible features, click Yes. To preserve the features, click No. Then save a copy in the latest Excel format. To see what might be lost, click Help. 	ot compatible with CSV (Comma delimited). Do you want to keep the workbook in this format?
	<u>Y</u> es <u>N</u> o	<u>H</u> elp

If you get this warning, click [Yes] to continue.

Next you'll need to close the .csv file to be able to import it into your Trail Blazer database. Click the red [x] in the upper-right.



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212		996-555-12	12			994-5	55-1212	
								Call before 8p
214		996-555-12	14	x403				Don't call after
						994-5	55-1222	
	11	4		x412				
224	Don't call after 9							Daytime only.
		996-555-12		x414			55-1225	
226	Could be a bad number	996-555-12	26	x415		994-5	55-1226	



Excel will likely prompt you with a warning to save the file again, if you are *certain* you have saved it in the previous steps you can click [Don't Save] (*which is what I did in this case*), but if you aren't certain, you can overwrite your other .csv file by saving again in order to finish closing the program.

*If you are certain you have 'saved' your spreadsheet in the last step you can click [Don't Save] because Excel will prompt you with this message after you saved it as a .csv prior.



Once saved and closed your file should look similar to my finished *example* below.



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🛚 🔆 Favorites	Name	Date	Туре	Size	Tags
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Recycle Bin	Your spreadsheet should be saved as	s a .csv file a	and closed pri	or	
🖻 퉬 sales	•				
📗 support-data-and-training	to importing into your database.				

Log into your Trail Blazer database, and navigate to the Contacts (Voters/Donors) list.



🖳 Settings Help	
Application Menu «	🖘 Search 🔖 Reset 🕂 New 🔚 🛅 😁 🔚 🜁 😚 File 🗸 Edit 🗸 🛞 🎥 Include Other Contacts
B B O	Image: Several Address Household Attribute Canvass F Reporting Image: Several Address Log Admin SQL
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Contact Contacts Addresses Households Contact Relationships Contributions/Pledges Contributions/Pledges Communications Communications Financial	 Individual Last Name: Corporation First/Org Name: Gorporation Foundation Middle Name: Nickname: Prior Last Name: Sort in household walking list order
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	Contacts List [enter search criteria above, then press "Search"]
	Incl ID Title Last Name First Name MI Address Type Address City State Zip Home Bus Phone

Make sure that the Import File Type is set to 'From CSV (Comma Delimited Text)' and that 'Add/Update Contact Records' is select from the Type drop-down.



Select 'From CSV (Comma Dilimited Text) if it isn't already selected.



Click [Browse], select the .csv file you saved in the previous steps, and click [Open]. In my example it was located in my Temp folder.



Locate your .csv file where you saved it, select it, and 'Open' it for importing into Trail Blazer.

3 Open	the first little free too the little					x
Computer + Local	Disk (C:) 🕨 Temp 🕨		✓ 4 Search	th Temp		٩
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Click the [+ New] button to create a Source Attribute.

Trail Blazer Import ((Step 1 of 3)	
Import File Type:	From CSV (Comma Delimited Text)	
Туре:	Add/Update Contact Records	
Source Location:	C:\Temp\2016-04-21-contact-list- for-trail-blazer-from-sales-force.csv	
Database Name:		
Source Attribute:	<skip setting="" source=""></skip>	
	OK 🙆 Cancel	

Click the [+ New] button to create a source attribute so you can quickly search for the imported list after the import is complete.



Create a distinguishable source attribute **name** and click **[OK]**. Some common ways to name this is to include the date, the data source, and your initials. If the import requires multiple passes you may want to categorize each 'pass' accordingly.



Once all the steps are complete for the 1st part of importing click **[OK]** to move onto the 2nd part which included Column Mapping and the Pre-Import Check.



Trail Blazer Import	(Step 1 of 3)
Import File Type:	From CSV (Comma Delimited Text)
Туре:	Add/Update Contact Records
Source Location:	C:\Temp\2016-04-21-contact-list- for-trail-blazer-from-sales-force.csv
Database Name:	
Source Attribute:	4/25/16 Contact Import from Sales New
	OK OCancel

Click [OK] to move onto 'column mapping' once all of these 1st steps are complete.

This will open up screen **2 of 3**, check the box in the upper-left to '**Merge**' **IF* you want to merge any new contacts with pre-existing contacts in your database (*if it's an exact match*), then click the **[Match Columns]** button.



Trail Blazer Import (Step 2 of 3) General Options Source Table/File: C:\Temp\2016-04-21-contact-list-for-trail-blazer-from-sales-force.csv During import, merge source data with existing contact records where appropriate. Please use extreme caution when merging while importing. Since new records are merged with existing data, you will not have the option of simply deleting the imported records if you discover a problem with the source data or the way columns were matched. On the other hand, if you import records without merging, you can Source Column Trail Blazer Column Match Columns OK 🙆 Cancel Pre-Import Check KING VV LEDGE DAJE VV VV . (I dIIDIZ. COIII/ KD 10

1. *IF you want to merge records your're importing with a matching record that's already in your database make sure you check this box.



Note: For a merge to occur the record must match by **Unique ID**, **Name + Email**, or **Name + Full Address**. You can also search for <u>possible</u> <u>duplicates</u> after the import and <u>merge them</u> together within your database.

You'll likely get a pop-up message warning you that if you are Wi-Fi that you verify you have a steady internet connection, if the internet gets interrupted it will cause the import to fail. Click **[OK]** to proceed, and *optionally* check the box if you don't want to get this pop-up message again.



S Trail Blazer Impo	Source
Table/File:	C:\Temp\2016-04-21-contact-list-for-trail-blazer-from-sales-force.csv
	erge source data with existing contact records where appropriate.
merged with	treme caution when merging while importing. Since new records are existing data, you will not have the option of simply deleting the ords if you discover a problem with the source data or the way columns Warning
Do Not Import Title LastName	WIRELESS ALERT If you are importing more than a few hundred records using a wireless connection, your import will likely fail. Either use an internet connection via a wire or contact Trail Blazer Customer Support for an alternate method of connecting to your database for importing data.
FirstName MiddleName	♥ Do not show this message again.
Suffix Nickname Street	ОК 2 -
Street2	Addr1 Address2
City	Addr1 City
State	Addr1 State
Zip <	Addr1 ZipCode
	Match Columns Pre-Import Check OK OK

1. *If you don't want this pop-up message to display again in the future check



If you are running an import with many columns you can **drag** the top and bottom of the screen up and down to make it easier to view. *My example is below.*



) Trail Blazer Import (Step	2 of 3)	x
General Options Source	*	
	p\2016-04-21-contact-list-for-trail-blacer-from-sales-force.csv	1
	rce data with existing contact records where appropriate.	
	nution when merging while importing. Since new records are	
merged with existing imported records if yo	data, you will not have the option of simply delign the bud discover a problem with the source data or the hay columns he other hand, if you import records without merging, you can	
Source Column	Trail Blazer Column	
Title	Title	
LastName	LastName 👻	
FirstName	FirstName 🔹	
MiddleName	MiddleName 👻	
Suffix	Suffix	
Nickname	NickName 💌	
Street	Addr1 Address 🔹	
Street2	Addr1 Address2 👻	
City	Addr1 City 👻	
State	Addr1 State 💌	
Zip	Addr1 ZipCode 🔹	
Zip4	Addr1 ZipCodePlus4(4 chars only)	
Country	Addr1 Nation	=
HomePhone	HomePhone 💌	
HomePhoneExt	HomePhoneExt	
BusPhone	BusPhone 🔻	
BusPhoneExt	BusPhoneExt 💌	
CellPhone	CellPhone	
CellPhoneExt	CellPhoneExt	
Email	Email	
Altemail	AltEmail	
BirthDate	BirthDate 🔻	
Employer	Employer	
Occupation	Occupation 🔹	
Jobtitle	JobTitle	
Note	Log_Array	
Gender	Sex 🗸	
User001	Do Not Import 🗸 🗸	
User002	Do Not Import 🗸 🗸	
User003	Do Not Import 🗸 🗸	

Drag the top and bottom edges of the screen up and down to adjust the height in order to make mapping columns easier.



Map your spreadsheet columns (the ones on the left) to the Trail Blazer columns (the ones on the right). If you previously mapped them without spaces in your spreadsheet they should automatically map, otherwise you'll need to select the appropriate field from the drop-down. <u>This article</u> provides a guideline for most of the fields in the database and what the column title needs to be to auto-map.

Img 1 of 2 – Column Mapping for Contact Data for Importing



- • · × Trail Blazer Import (Step 2 of 3) General Options Source Table/File: C:\Temp\2016-04-21-contact-list-for-trail-blazer-from-sales-force.csv During import, merge source data with existing contact records where appropriate. Please use extreme caution when merging while importing. Since new records are . merged with existing data, you will not have the option of simply deleting the imported records if you discover a problem with the source data or the way columns were matched. On the other hand, if you import records without merging, you can Ŧ Source Column Trail Blazer Column Title Title • LastName LastName FirstName FirstName MiddleName MiddleName Suffix Suffix • Nickname NickName • Street Addr1 Address -Street2 Addr1 Address2 Ŧ City Addr1 City -State Addr1 State . Zip Addr1 ZipCode Ŧ Zip4 Addr1 ZipCodePlus4(4 chars only) • Country Addr1 Nation HomePhone HomePhone -HomePhoneExt HomePhoneExt -BusPhone BusPhone Ŧ BusPhoneExt BusPhoneExt -CellPhone CellPhone CellPhoneExt CellPhoneExt • Email Email Ŧ Altemail AltEmail • BirthDate BirthDate Ŧ Employer Employer Occupation Occupation -Jobtitle JobTitle Ŧ Note Log_Array Ŧ m/kb Gender Sex Ŧ User001 User001 • User002 User002 Ŧ

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Img 1 of 2 - Column mapping of contact data into Trail Blazer.

-001



Img 2 of 2 – Column Mapping for Contact Data for Importing



Img 2 of 2 - Column mapping of contact data into Trail Blazer.

*This import includes:

- (3) User Fields
- (1) User Decimal Field
- (1) User Date Field

Trail Blazer Import (Step 2	2 of 3)	x
General Options Source		
Table/File: C:\Temp	>>2016-04-21-contact-list-for-trail-blazer-from-sales-force.csv	-
	ce data with existing contact records where appropriate.	
Please use extreme cau merged with existing of	ution when merging while importing. Since new records are data, you will not have the option of simply deleting the	
	u discover a problem with the source data or the way columns e other hand, if you import records without merging, you can	•
Source Column	Trail Blazer Column	*
Suffix	Suffix 👻	
Nickname	NickName	
Street	Addr1 Address 🔹	
Street2	Addr1 Address2 👻	
City	Addr1 City 💌	
State	Addr1 State 💌	
Zip	Addr1 ZipCode 🔹	
Zip4	Addr1 ZipCodePlus4(4 chars only)	
Country	Addr1 Nation	
HomePhone	HomePhone	
HomePhoneExt	HomePhoneExt	
BusPhone	BusPhone 👻	
BusPhoneExt	BusPhoneExt 👻	
CellPhone	CellPhone 👻	
CellPhoneExt	CellPhoneExt 👻	
Email	Email	
Altemail	AltEmail	E
BirthDate	BirthDate 👻	
Employer	Employer 👻	
Occupation	Occupation 👻	
Jobtitle	JobTitle 👻	
Note	Log_Array 👻	
Gender	Sex 👻	
User001	User001 👻	
User002	User002 👻	
User003	User003 👻	
UserDate01	User Date 1 StringMMDDYYYY 🔹	
UserDec01	User Decimal 01 👻	
Website	WebSite	
Board Member Status	Attribute Builder / Attribute Name	



Once you finish the column mapping click the **[Pre-Import Check]** button which will scan your .csv file to check for any issues that will cause the import to fail (*errors*) and any other data you may want to cleanup prior to importing (*warnings*).



CellPhoneExt	CellPhoneExt					
Email	Email					
Altemail	AltEmail 👻 🗏					
BirthDate	BirthDate 🔹					
Employer	Employer 👻					
Occupation	Occupation 👻					
Jobtitle	JobTitle 👻					
Note	Log_Array 🗸					
Gender	Sex 🔹					
User001	User001 👻					
User002	User002 🔹					
User003	User003 🔹					
UserDate01	User Date 1 StringMMDDYYYY -					
UserDec01	User Decimal 01 🗸					
Website	WebSite 👻					
Board Member Status	Attribute Builder / Attribute Name					
•	4					
Match Columns Pre-Import Check OK OK						

The pre-import check will scan your .csv file for 'errors' that will cause the import to fail and 'warnings' which should be cleaned up. The end goal is to get 0 errors and 0 warnings prior to Kumming Sourt final import.



Once your file is free of any errors, click **[OK]** to proceed.

Once you get your file cleaned to the point where there aren't any errors, click [OK] to proceed.



Click **[OK]** again on the column mapping screen.



Altemail	AltEmail
BirthDate	BirthDate
Employer	Employer
Occupation	Occupation 👻
Jobtitle	JobTitle
Note	Log_Array
Gender	Sex 💌
User001	User001 🔻
User002	User002 🔹
User003	User003 🔹
UserDate01	User Date 1 StringMMDDYYYY 🔹
UserDec01	User Decimal 01
Website	WebSite
Board Member Status	Attribute Builder / Attribute Name
•	4
Match Colum	ns Pre-Import Check OK Cancel

*If you are importing an address(s) you'll get another screen for the address mapping i.e. Mailing, Work, Home, etc. Check the corresponding boxes for the type of address(s) you're brining in and click **[OK]**. In my example I brought in a single address that I mapped to Home/Default Display/Mailing, you can always adjust these checkboxes once the data is in if necessary.



Check the boxes for the type of address(s) you're brining in i.e Work, Home, Mailing, Default Display, etc.

[Address Import Fla	gs (Step 3 of 3)		X
	Addr1 Type			
	 Home Main Other Former Address Type: 	Work Main Other	 Default Display Mailing Registration 	
			💿 ок	Cancel



The import will commence, you'll get a status screen that displays how many records have been created, updates, as well as any errors that are taking place. If you are getting errors that weren't caught during the pre-import check you'll want to pause and cancel the import to fix the original data set. *My example is below.*

As the import runs you'll get a status screen where you can see which records have been updated/created as well as if there are any errors occuring. If you are getting errors you'll want to cancel the import and cleanup those errors.

P	rogress	8
	Progress	
3	Contact records imported: 8 Contact records to import: 11 Created: 4 Updated: 4 Errors: 0 Running Time: 0.00:00:07 Records per second: 1.14	
		Pause O Cancel



Once the import is complete you'll get a screen that displays the results, click **[OK]** to finish. *My example is below where 11 records were imported with* **7 new records created** and **4 updates** to existing records.

You'll get an import results screen after the import has completed.



To view the list of data you imported open a new **Contacts** (*Voters/Donors*) list, navigate to the Attributes tab, the Source folder, check the box for the new source attribute you created during the import and click **[Search]**. *In my example it produced* **11** *contact records that were either created or updated.*



Settings Help 4											
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	L			General Motors, Inc.	101 Big Car Rd		Detroit	MI	35101		
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			Schriner	Andrew	6301 84th Ct N		Brooklyn Parl	c MN	55110	(993) 555-1224	
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If the import was a success you're finished. If it went awry you can <u>roll-it-back</u> with the rollback utility.



It's also a good idea to close down your database and relaunch it before starting on any other work. If you **imported emails** you'll need to send in a request to our support address (<u>support@trailblz.com</u>) requesting that those get enabled and provide the source of where the list came from.

Take a look at the **related resources** below for a plethora of other information on prepping and running imports.



- YouTube Channel

- Knowledge Base Articles

- 3rd Party Resources



Related Resources

Article: Import Templates Article: Field/Column Mapping When Importing Voter/Donor Data **Article:** Pre-Import Check **Article:** Importing Contributions Article: Start Import – Importing Data From Access – Add/Update Voter Article: Rollback – Undo Function Article: Import Information – Definitions and Column Data Type Article: Log Notes vs User Fields vs Attributes Article: Exporting from QuickBooks and Importing Contribution Records into Trail Blazer Article: How to Configure your RDP (Remote Desktop) Settings on a PC to Allow Access to your Clipboard, and Disk Drives Article: Importing Pledges – Best Practices Article: Importing District Information – from Non Registered Voters Article: Export Outlook Contacts Video: Importing 102 Importing your first list Video: Importing 101 What to avoid Video: Importing 102 Merge or Do Not Merge during import Video: Attributes – Import with Date and Value Video: Attributes – Import with Date and Value Video: Excel- LeadingOs – Retaining When Opening CSV Files In Excel Video: Importing Contributions



Trail Blazer Live Support

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- Email: support@trailblz.com
- Facebook: https://www.facebook.com/pages/Trail-Blazer-Software/64872951180
- Twitter: <u>https://twitter.com/trailblazersoft</u>

* As a policy we require that you have taken our intro training class before calling or emailing our live support team.

<u>*Click here*</u> to view our calendar for upcoming classes and events. Feel free to sign up other members on your team for the same training.

* After registering you'll receive a confirmation email with the instructions for how to log into the <u>GoToMeeting</u> session where we host our live interactive trainings.

* This service <u>is</u> included in your contract.