Running an Import of Contact Data from Excel into your Database - Basic Overview

Author: Joel Kristenson
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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.

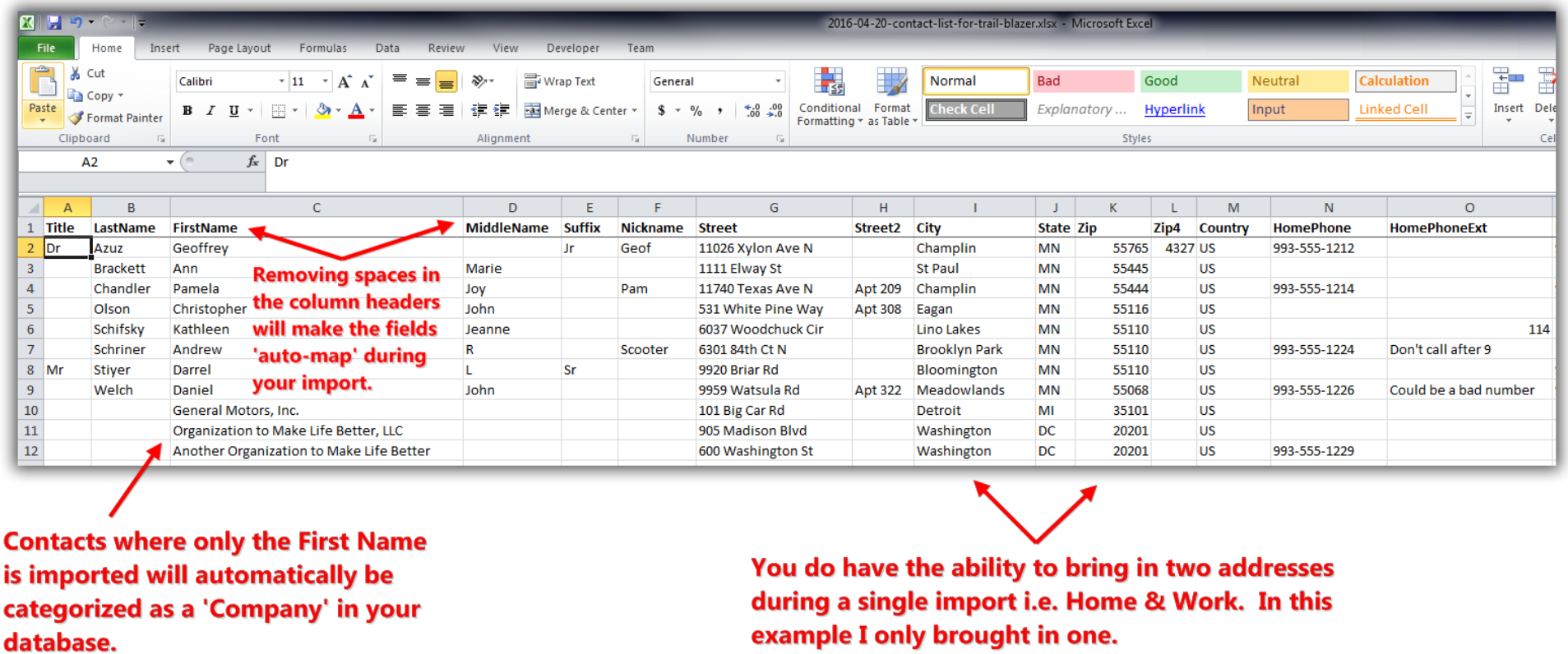
Tip: Open a new session of your database prior to running an import, if the import goes awry it will be easier to roll-it-back. Also, make sure you set a **Source Attribute** during the import process which makes it easy to find the list you imported and verify the results, it's also beneficial if you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

Steps

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

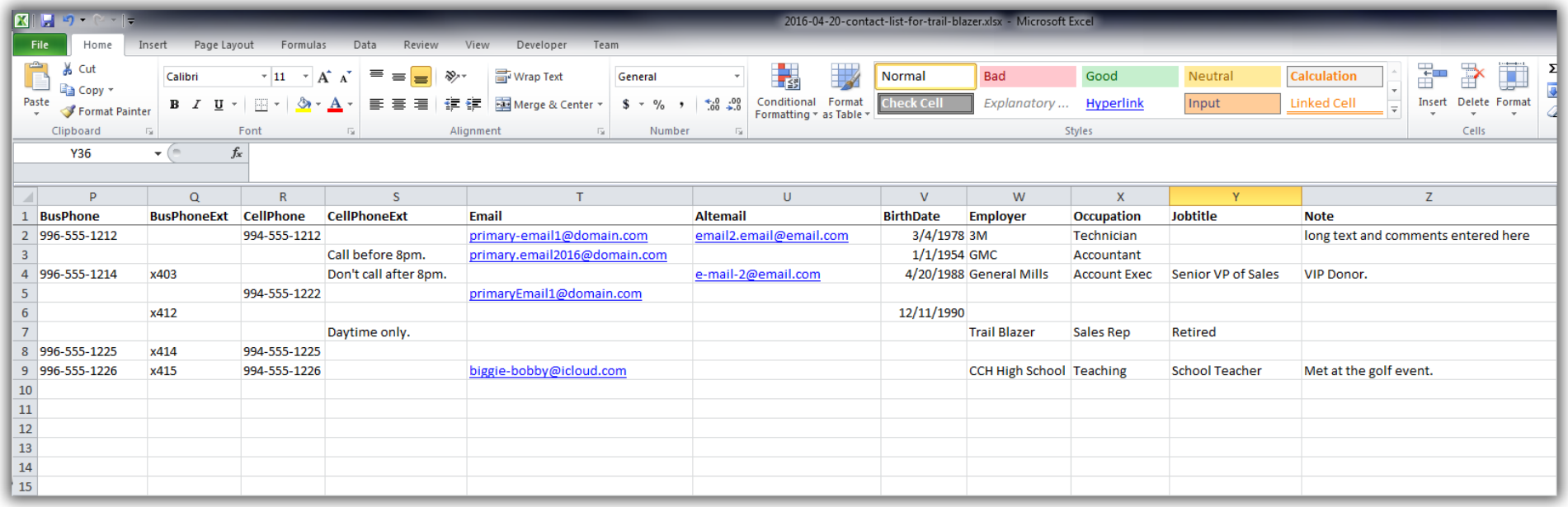
Img 1 - Column Mapping for a Contact Import



	Title	LastName	FirstName	MiddleName	Suffix	Nickname	Street	Street2	City	State	Zip	Zip4	Country	HomePhone	HomePhoneExt
2	Dr	Azuz	Geoffrey		Jr	Geof	11026 Xylon Ave N		Champlin	MN	55765	4327	US	993-555-1212	
3		Brackett	Ann	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	
5		Olson	Christopher	John			531 White Pine Way	Apt 308	Eagan	MN	55116		US		
6		Schifsky	Kathleen	Jeanne			6037 Woodchuck Cir		Lino Lakes	MN	55110		US		114
7		Schriner	Andrew	R		Scooter	6301 84th Ct N		Brooklyn Park	MN	55110		US	993-555-1224	Don't call after 9
8	Mr	Stiyer	Darrel	L	Sr		9920 Briar Rd		Bloomington	MN	55110		US		
9		Welch	Daniel	John			9959 Watsula Rd	Apt 322	Meadowlands	MN	55068		US	993-555-1226	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		
12			Another Organization to Make Life Better				600 Washington St		Washington	DC	20201		US	993-555-1229	

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

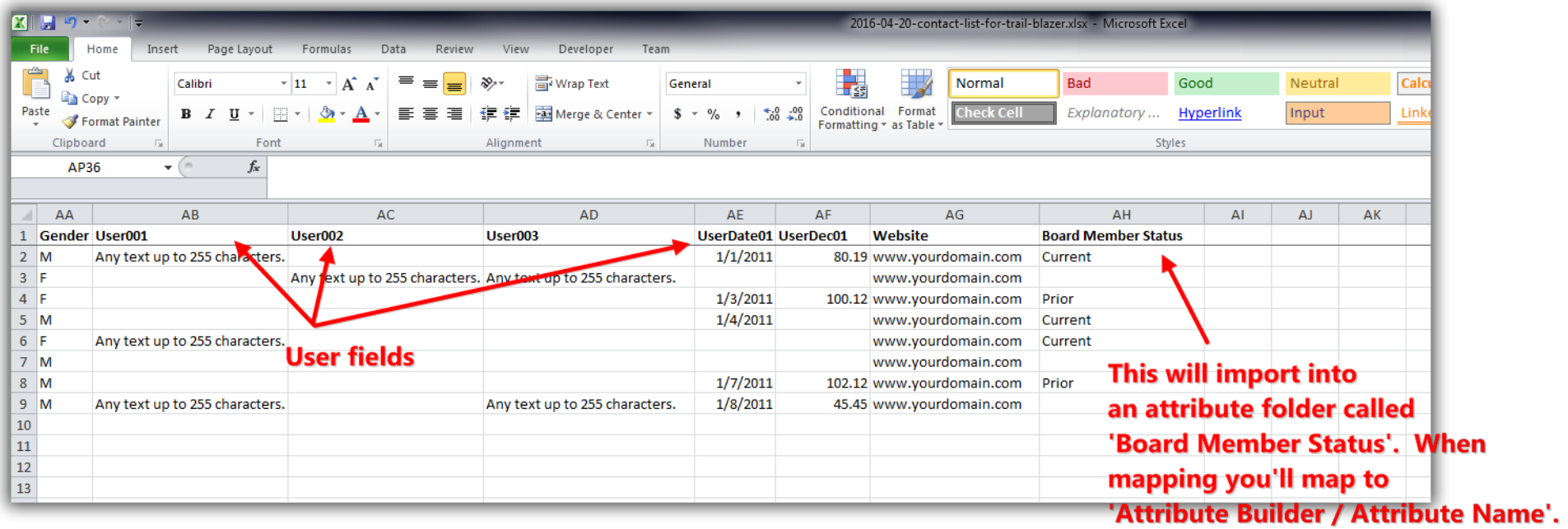
Img 2 - Contact Import from Excel



	P	Q	R	S	T	U	V	W	X	Y	Z
1	**BusPhone**	**BusPhoneExt**	**CellPhone**	**CellPhoneExt**	**Email**	**Altemail**	**BirthDate**	**Employer**	**Occupation**	**Jobtitle**	**Note**
2	996-555-1212		994-555-1212		primary-email1@domain.com	email2.email@email.com	3/4/1978	3M	Technician		long text and comments entered here
3				Call before 8pm.	primary.email2016@domain.com		1/1/1954	GMC	Accountant		
4	996-555-1214	x403		Don't call after 8pm.		e-mail-2@email.com	4/20/1988	General Mills	Account Exec	Senior VP of Sales	VIP Donor.
5			994-555-1222		primaryEmail1@domain.com						
6		x412					12/11/1990				
7				Daytime only.				Trail Blazer	Sales Rep	Retired	
8	996-555-1225	x414	994-555-1225								
9	996-555-1226	x415	994-555-1226		biggie-bobby@icloud.com			CCH High School	Teaching	School Teacher	Met at the golf event.
10											
11											
12											
13											
14											
15											

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

Img 3 - Column Mapping for Contact Import from Excel

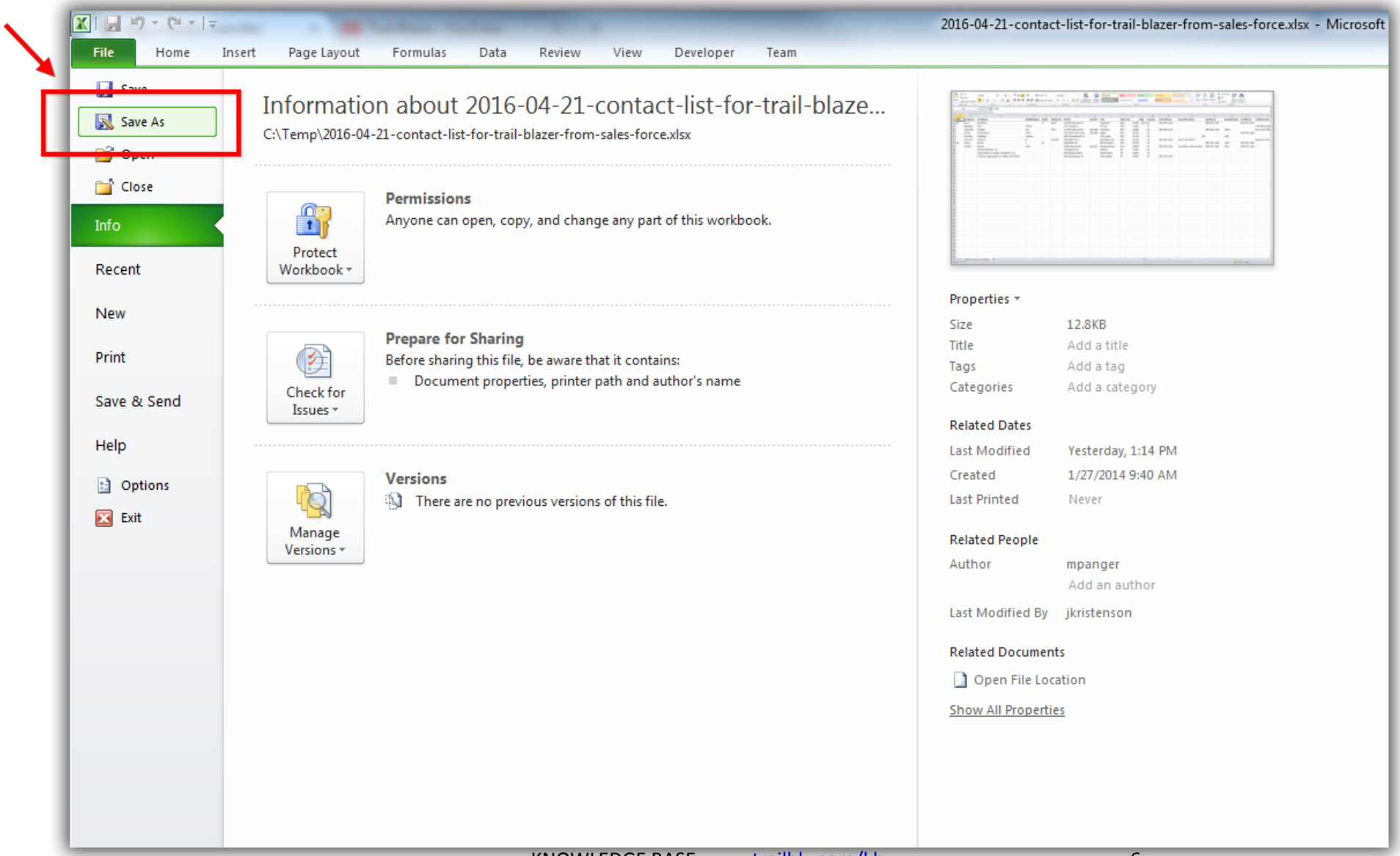


Take a look at the **Related Resources** section below for links to example spreadsheets to use as a starting point as well many other import related articles and videos to get help on correctly mapping your column headers.

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-trail-blazer-from-sales-force.csv**' as shown in the images below.*

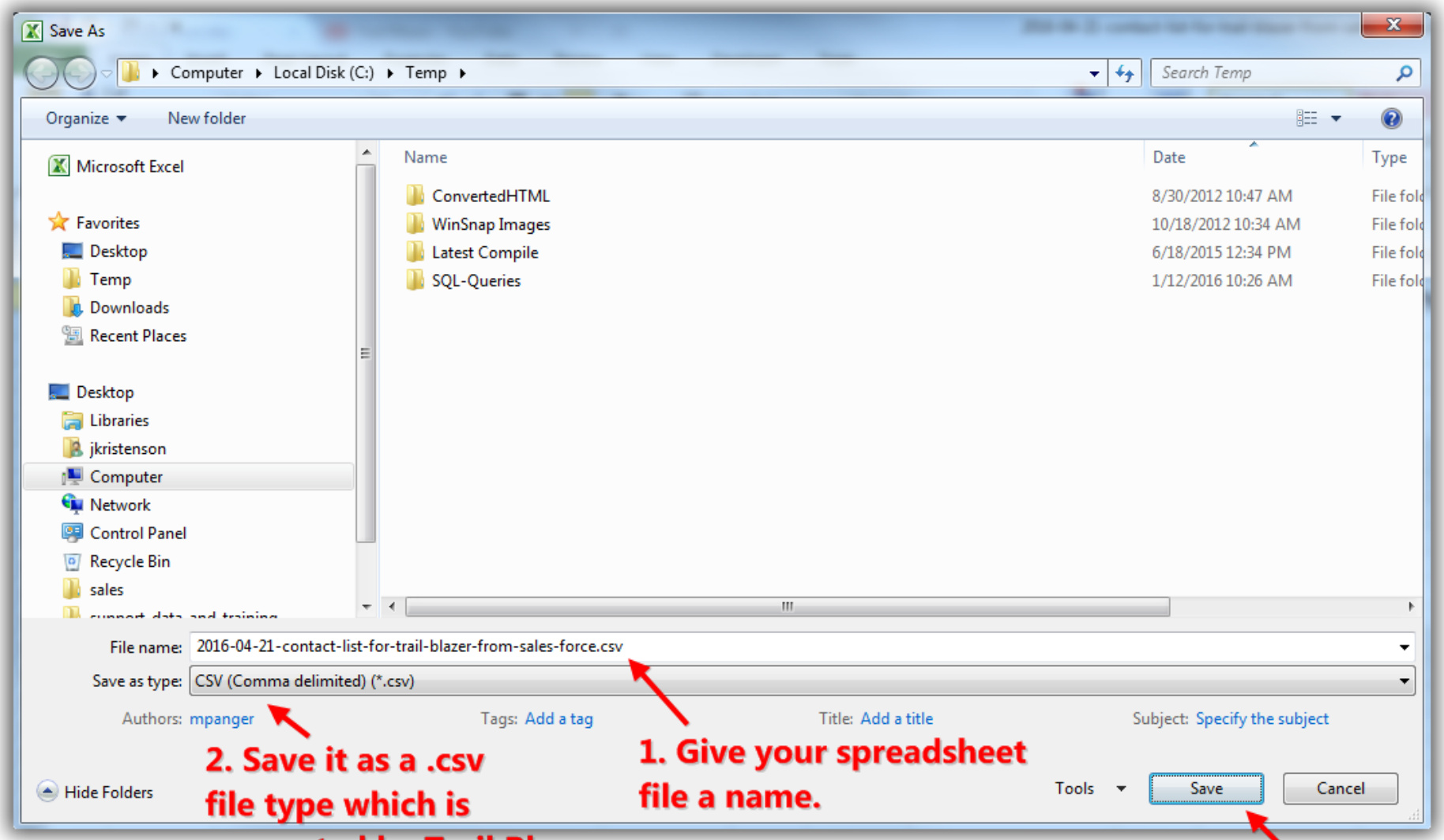
Img 1 – Save the Spreadsheet

Running an Import of Contact Data from Excel into your Database - Basic Overview

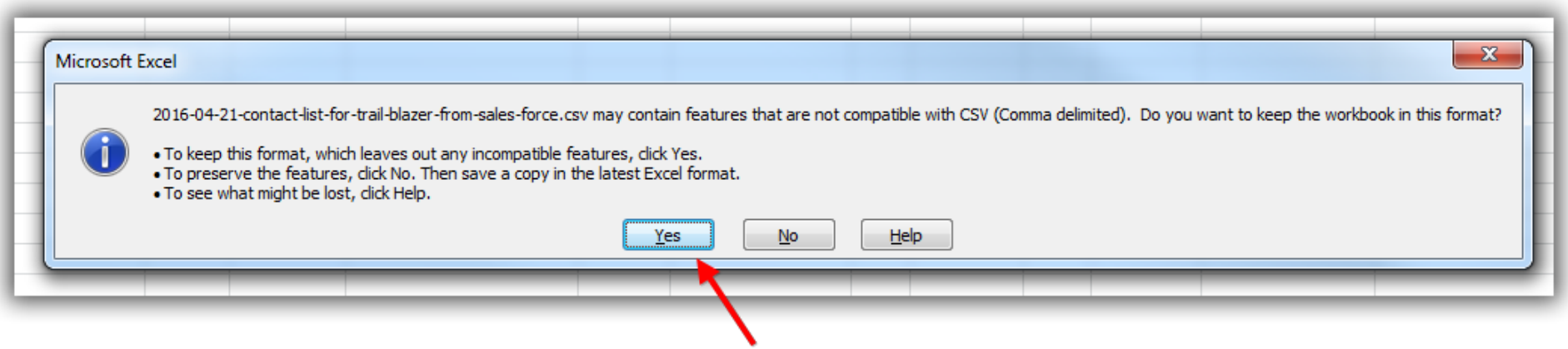


Img 2 – Select a Location on your Machine to Save the File, Give it a Name, and Save it as a .csv File Type

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



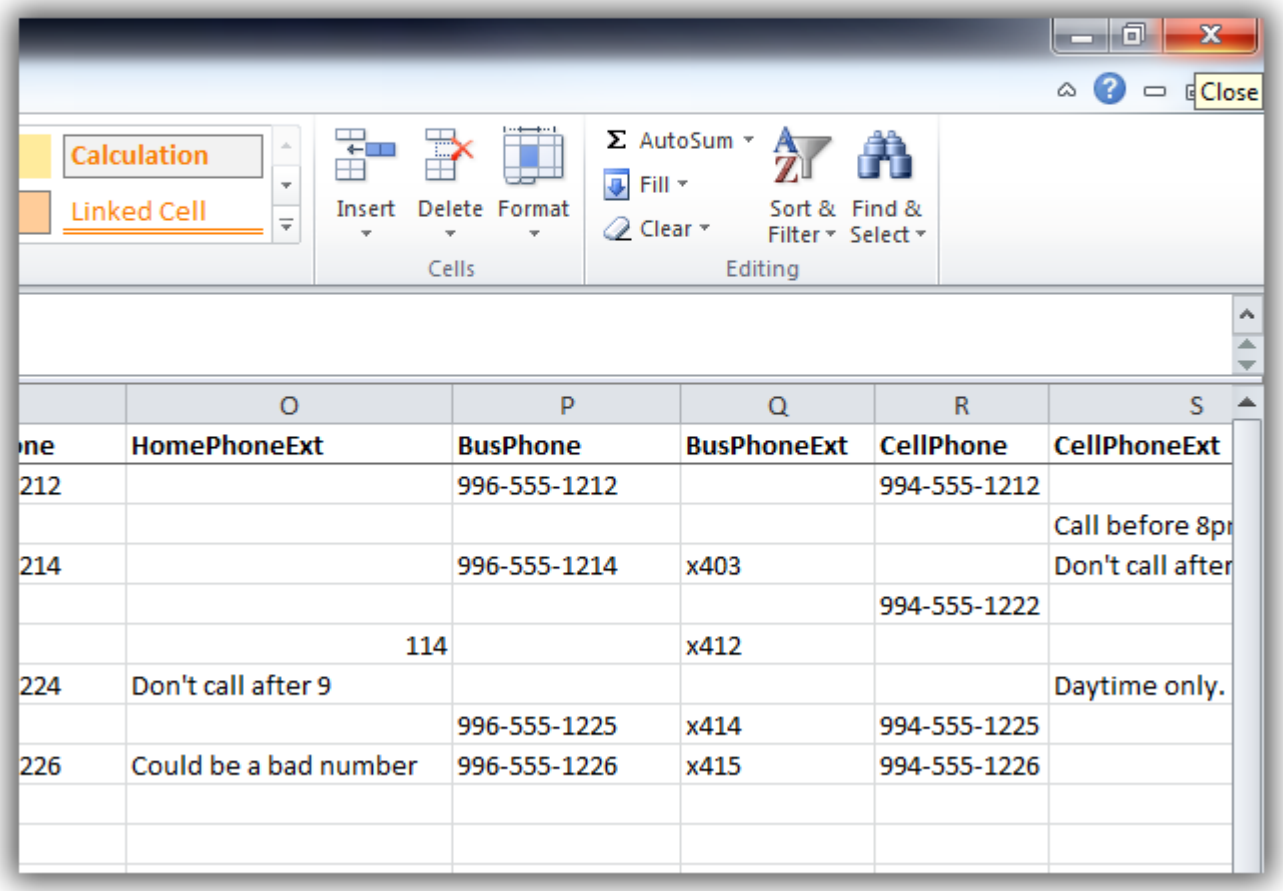
Img 3 – Click [Yes] if Prompted when Saving as a .csv File Type



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.

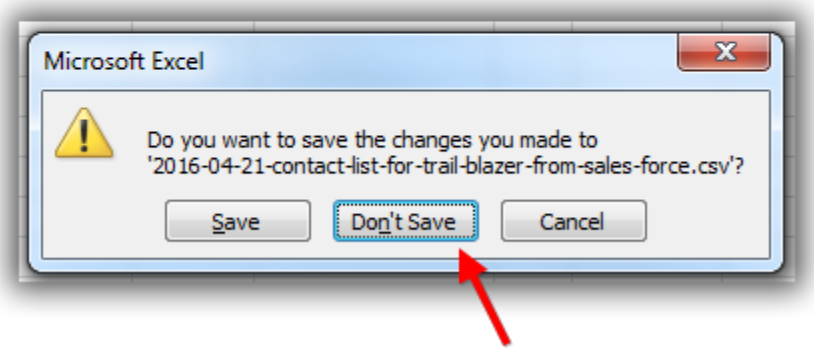
Close the .csv spreadsheet in order to import to your database.



	O	P	Q	R	S
ne	HomePhoneExt	BusPhone	BusPhoneExt	CellPhone	CellPhoneExt
212		996-555-1212		994-555-1212	
					Call before 8pr
214		996-555-1214	x403		Don't call after
				994-555-1222	
	114		x412		
224	Don't call after 9				Daytime only.
		996-555-1225	x414	994-555-1225	
226	Could be a bad number	996-555-1226	x415	994-555-1226	

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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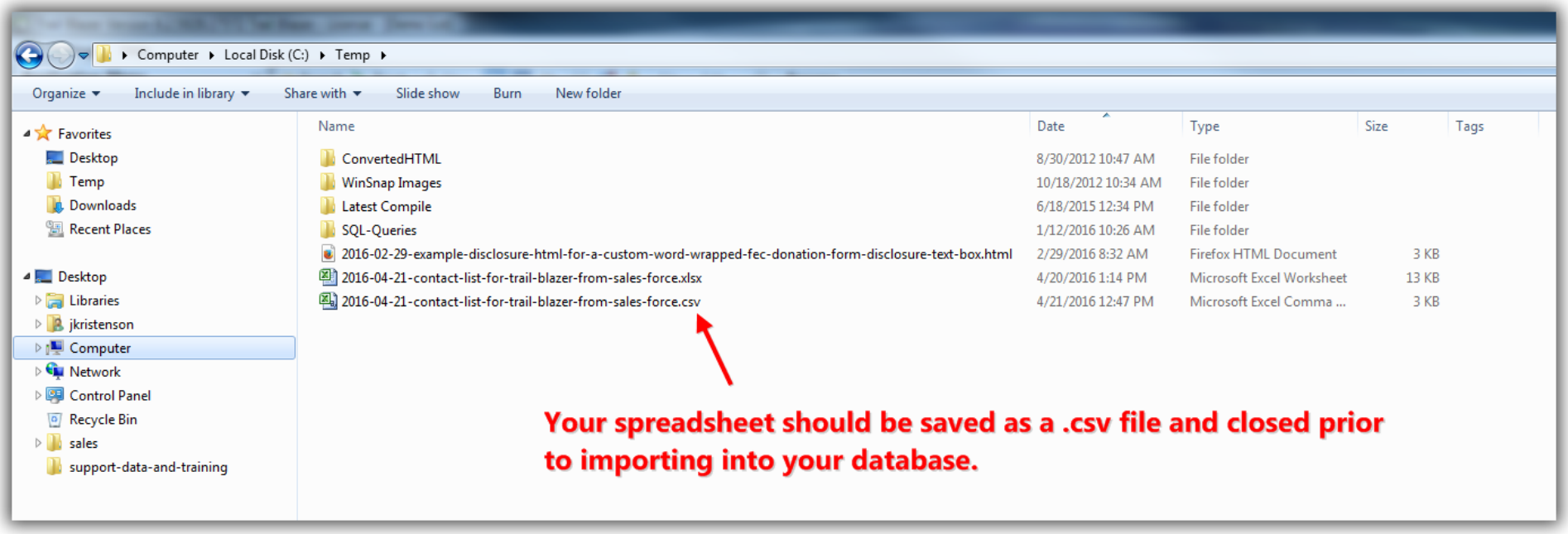
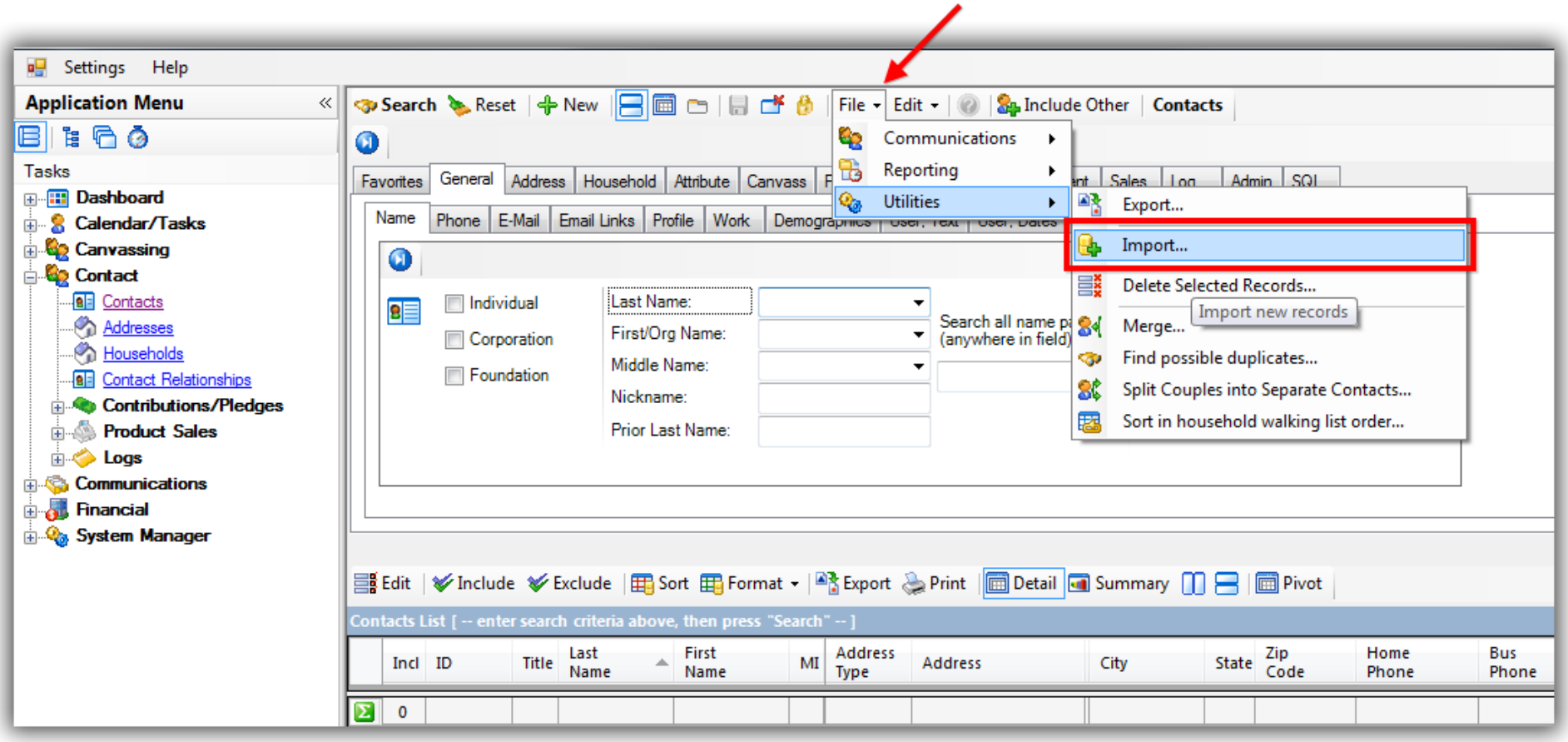
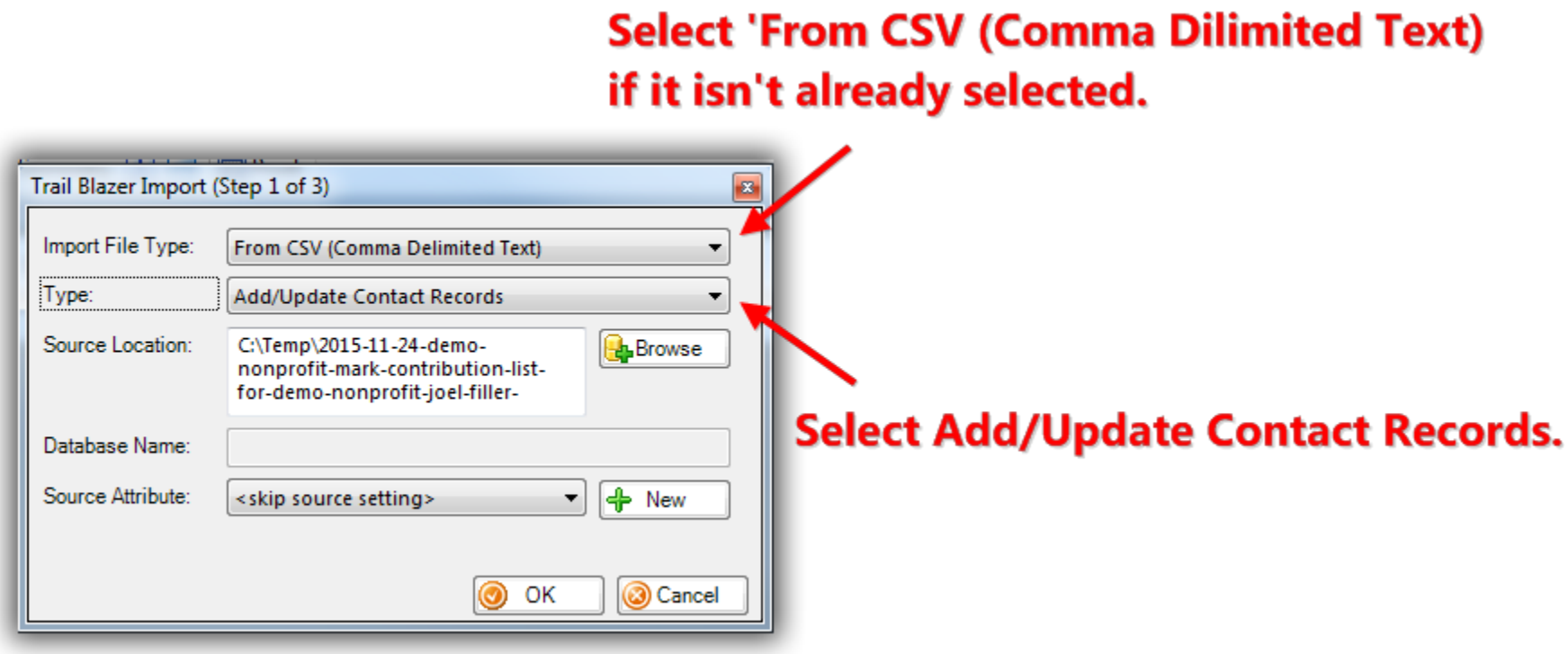


Log into your **Trail Blazer** database, and navigate to the **Contacts** (*Voters/Donors*) list.



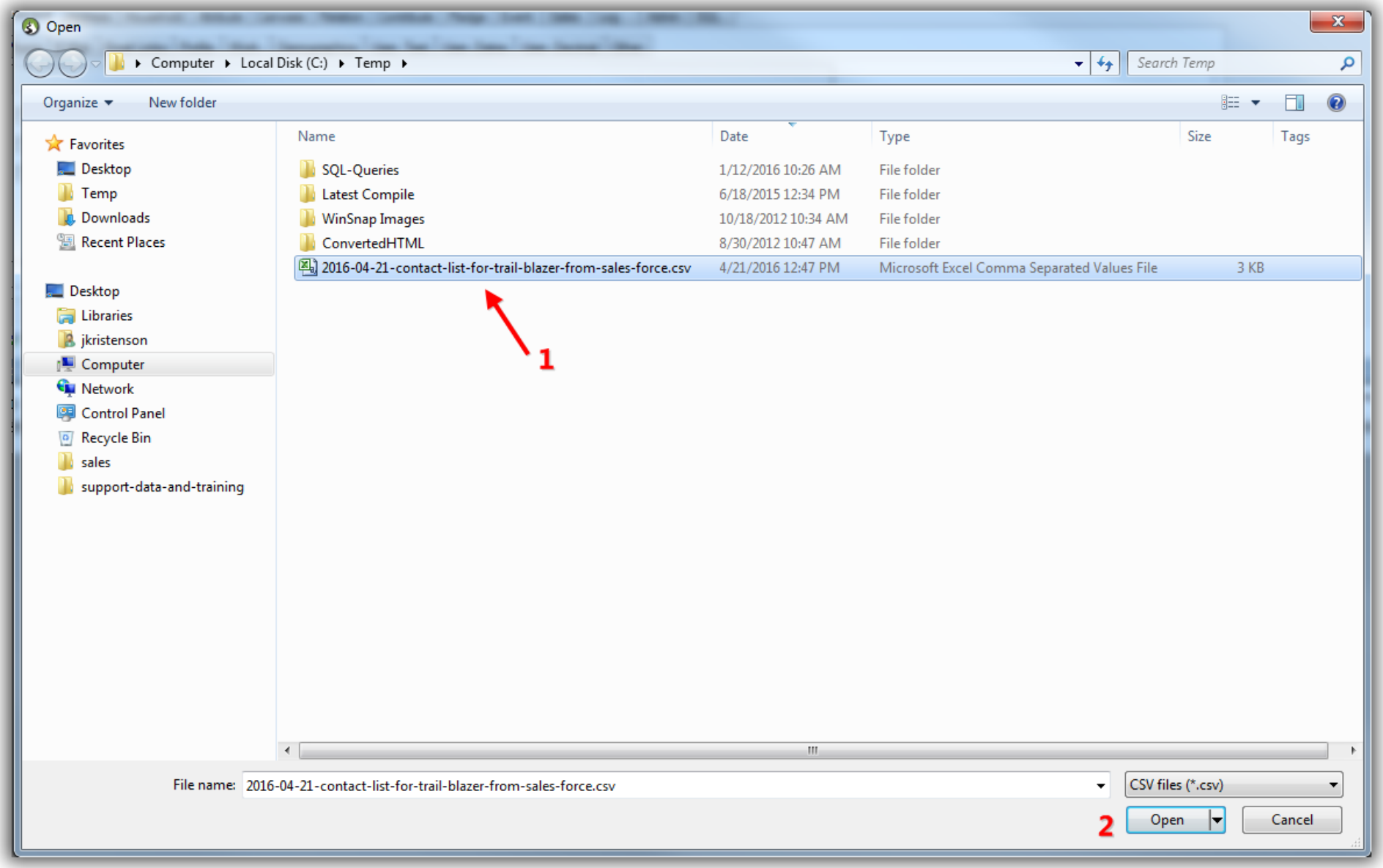
Make sure that the **Import File Type** is set to '**From CSV (Comma Delimited Text)**' and that '**Add/Update Contact Records**' is select from the **Type** drop-down.



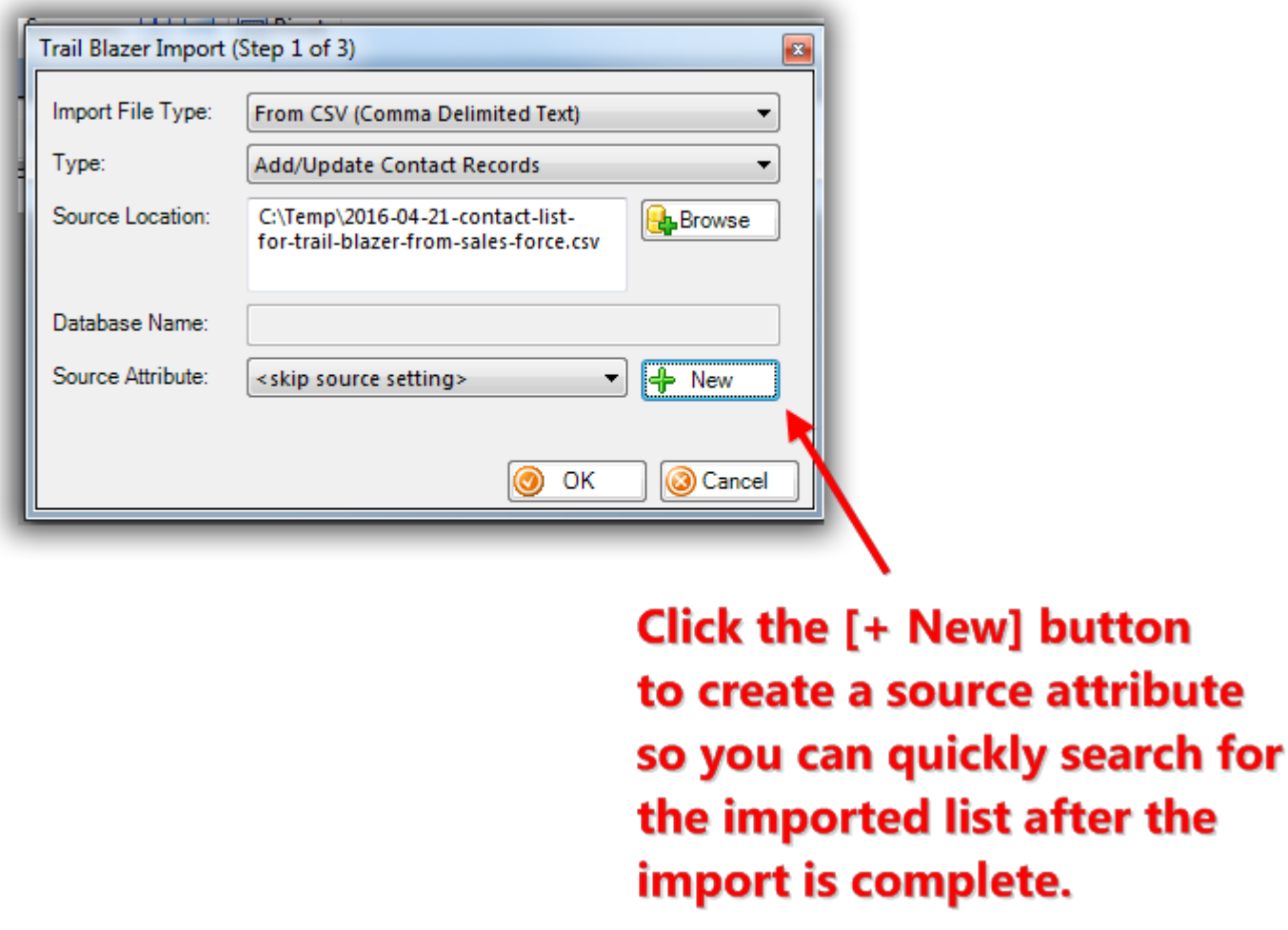
Click **[Browse]**, select the .csv file you saved in the previous steps, and click **[Open]**. *In my example it was located in my **Temp** folder.*

Running an Import of Contact Data from Excel into your Database - Basic Overview

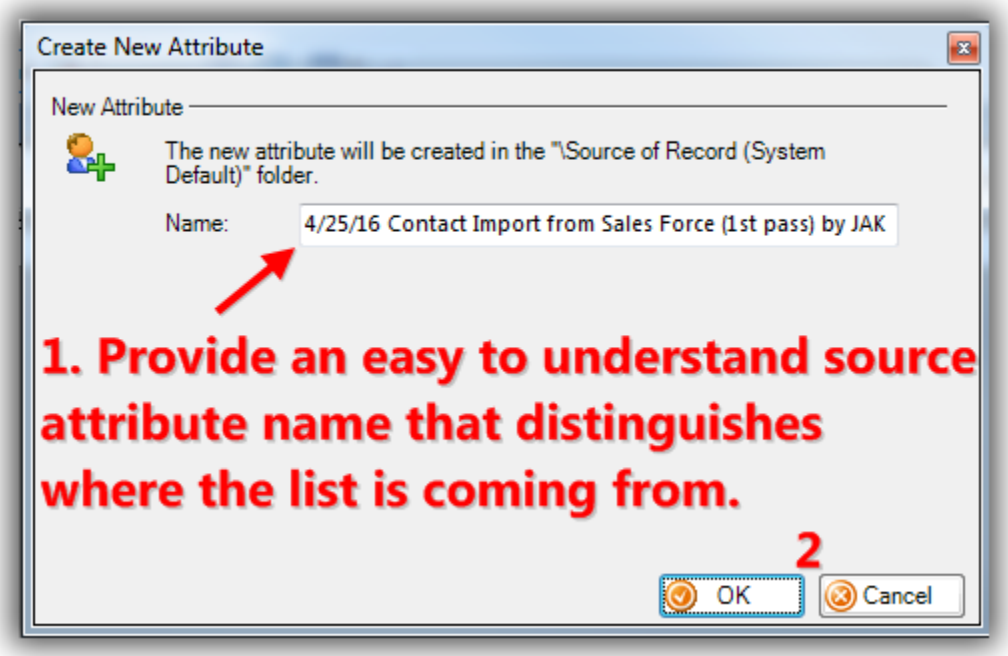
Locate your .csv file where you saved it, select it, and 'Open' it for importing into Trail Blazer.



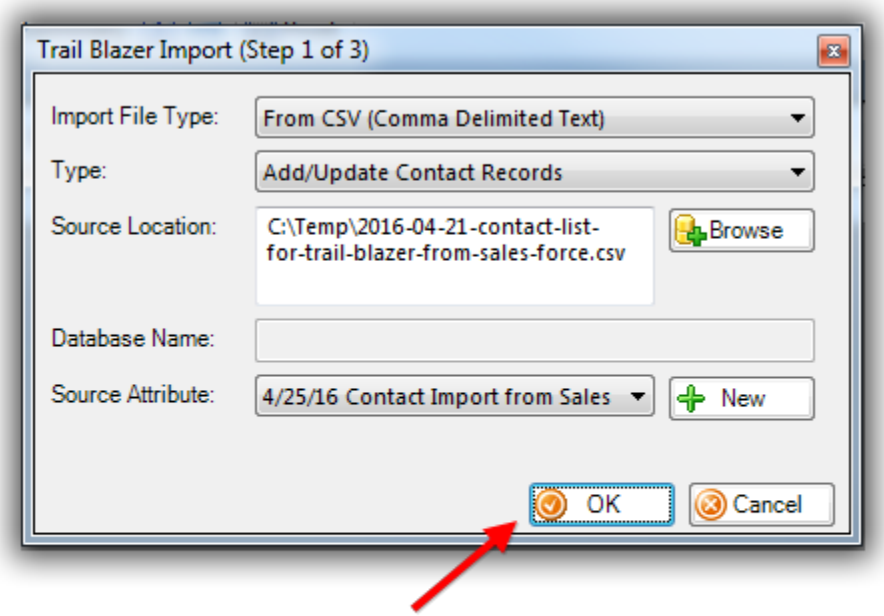
Click the **[+ New]** button to create a **Source Attribute**.



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.



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.

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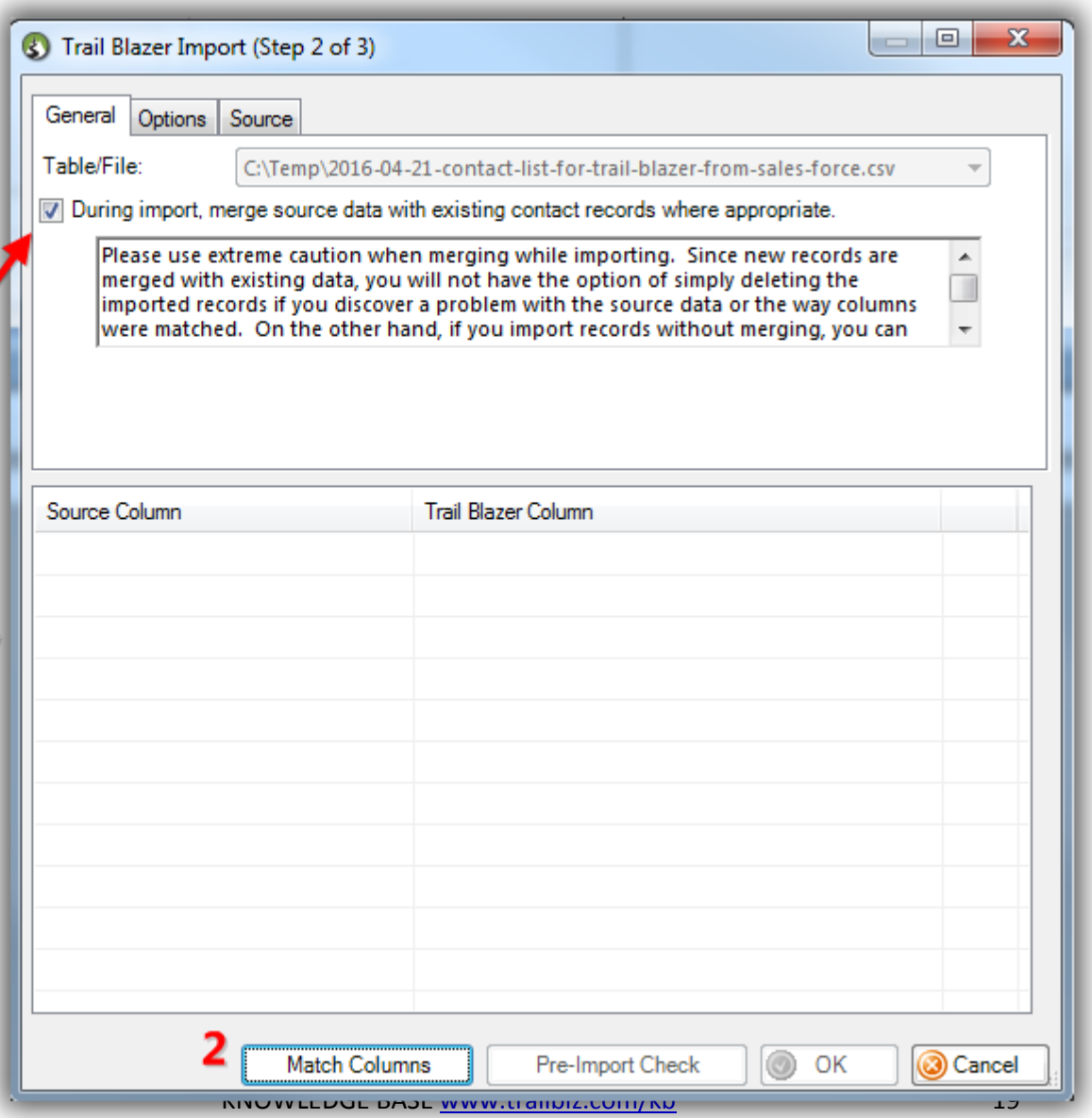
1. *IF you want to merge records your're importing with a matching record that's already in your database make sure you check this box.



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

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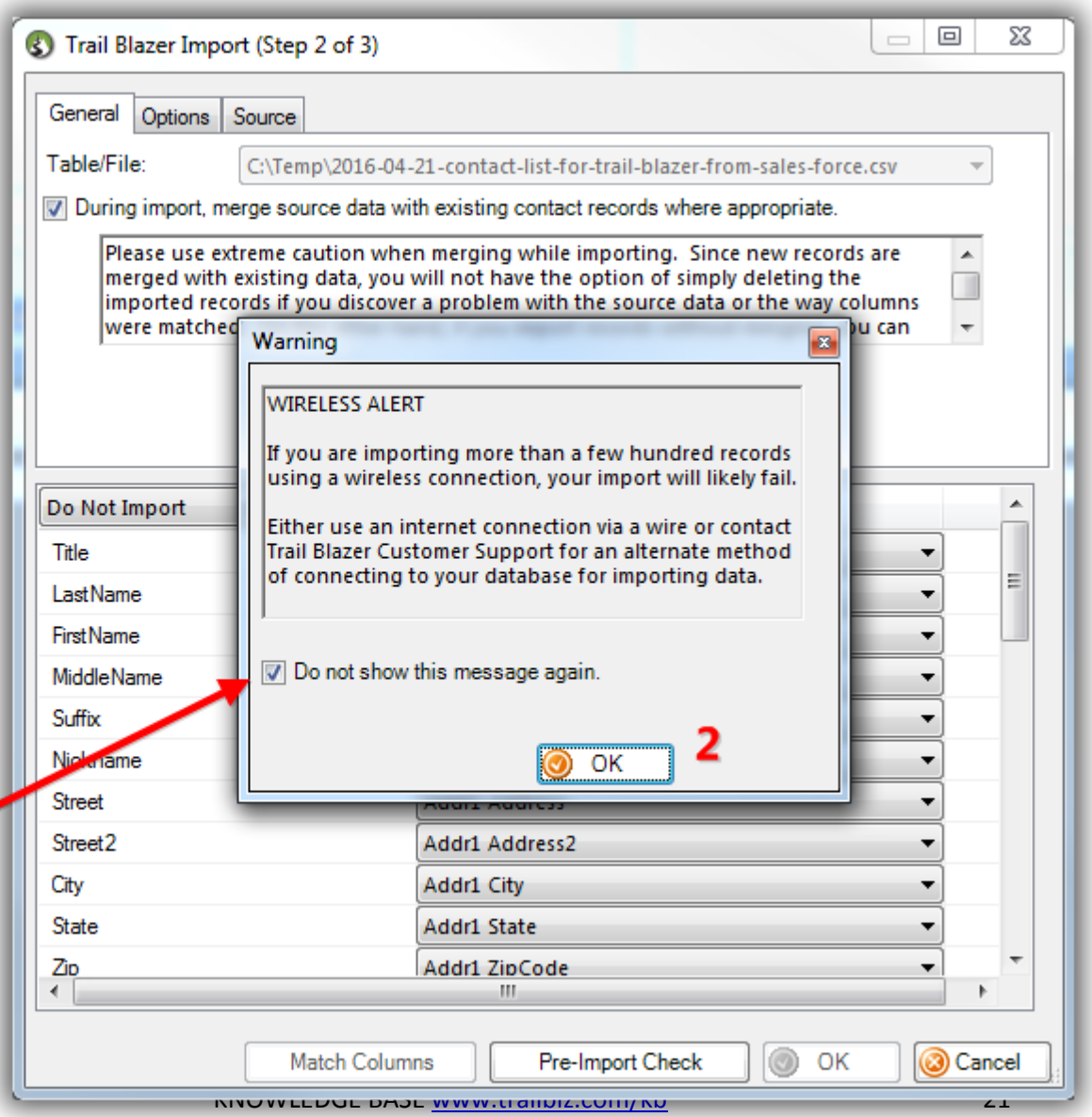

1. *If you don't want this pop-up message to display again in the future check

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.*

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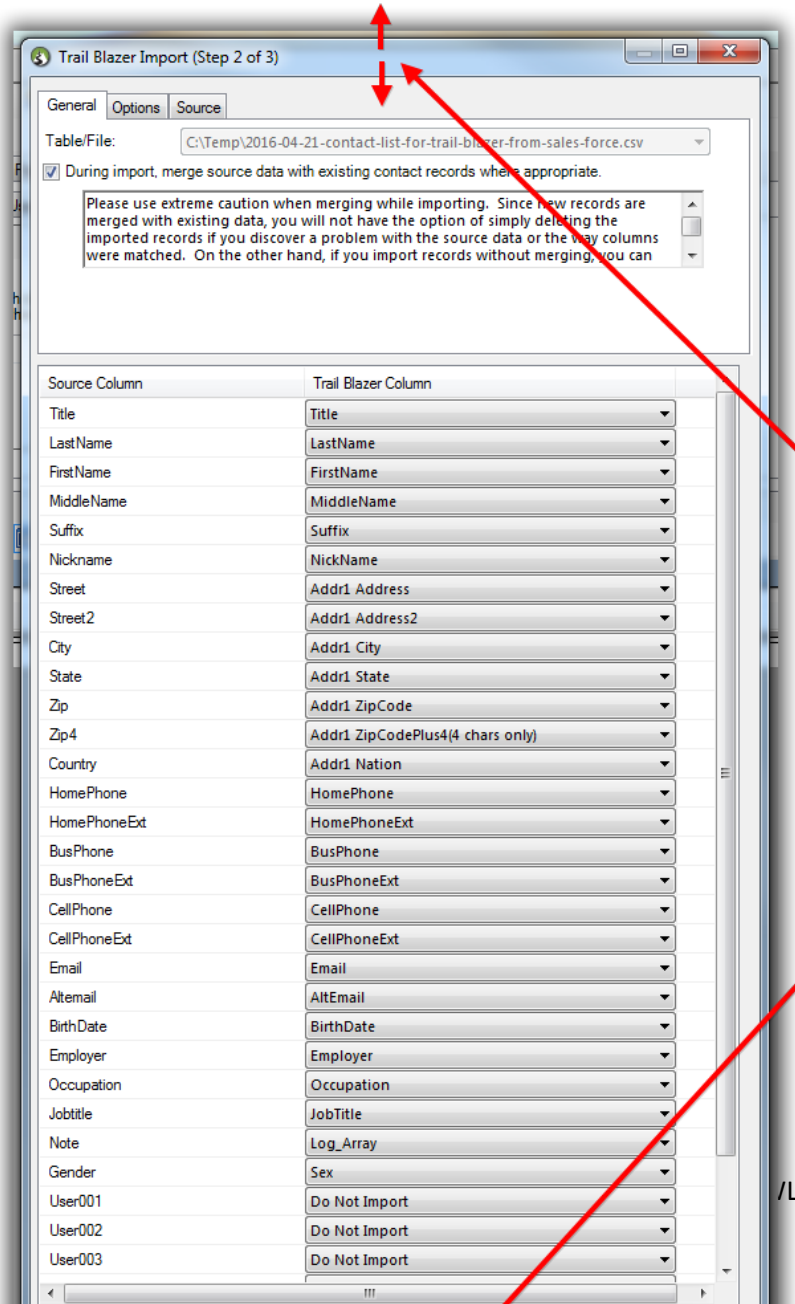
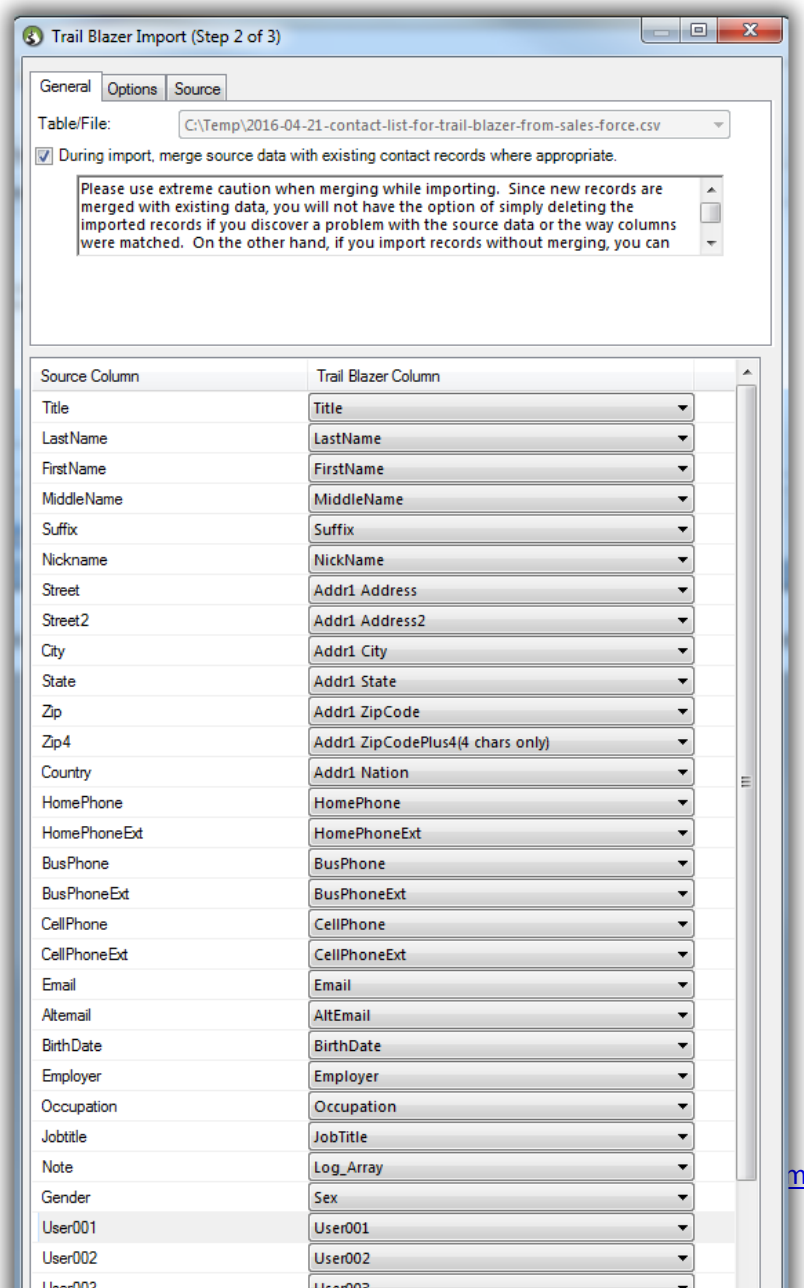


Drag the top and bottom edges of the screen up and down to adjust the height in order to make mapping columns easier.

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.* *This article provides a guideline for most of the fields in the database and what the column title needs to be to auto-map.*

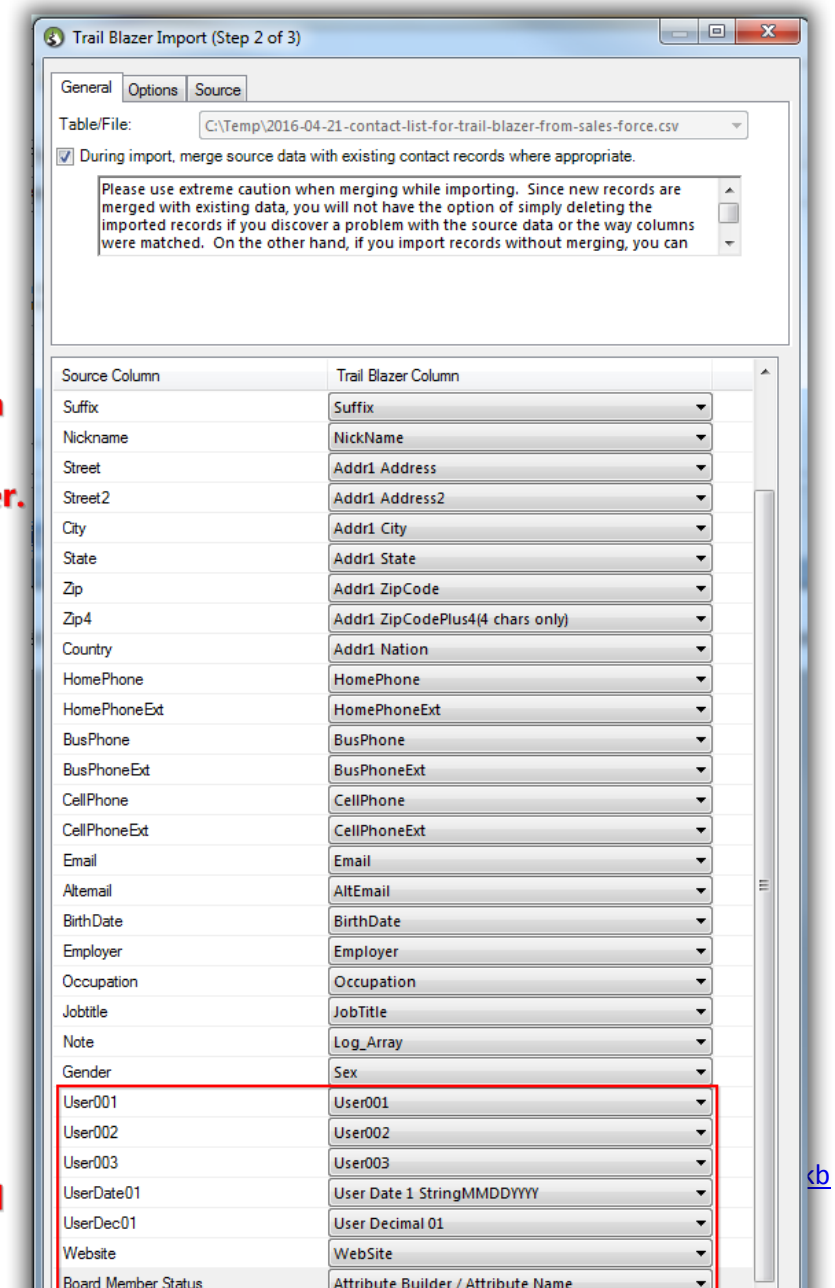
Img 1 of 2 – Column Mapping for Contact Data for Importing

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



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

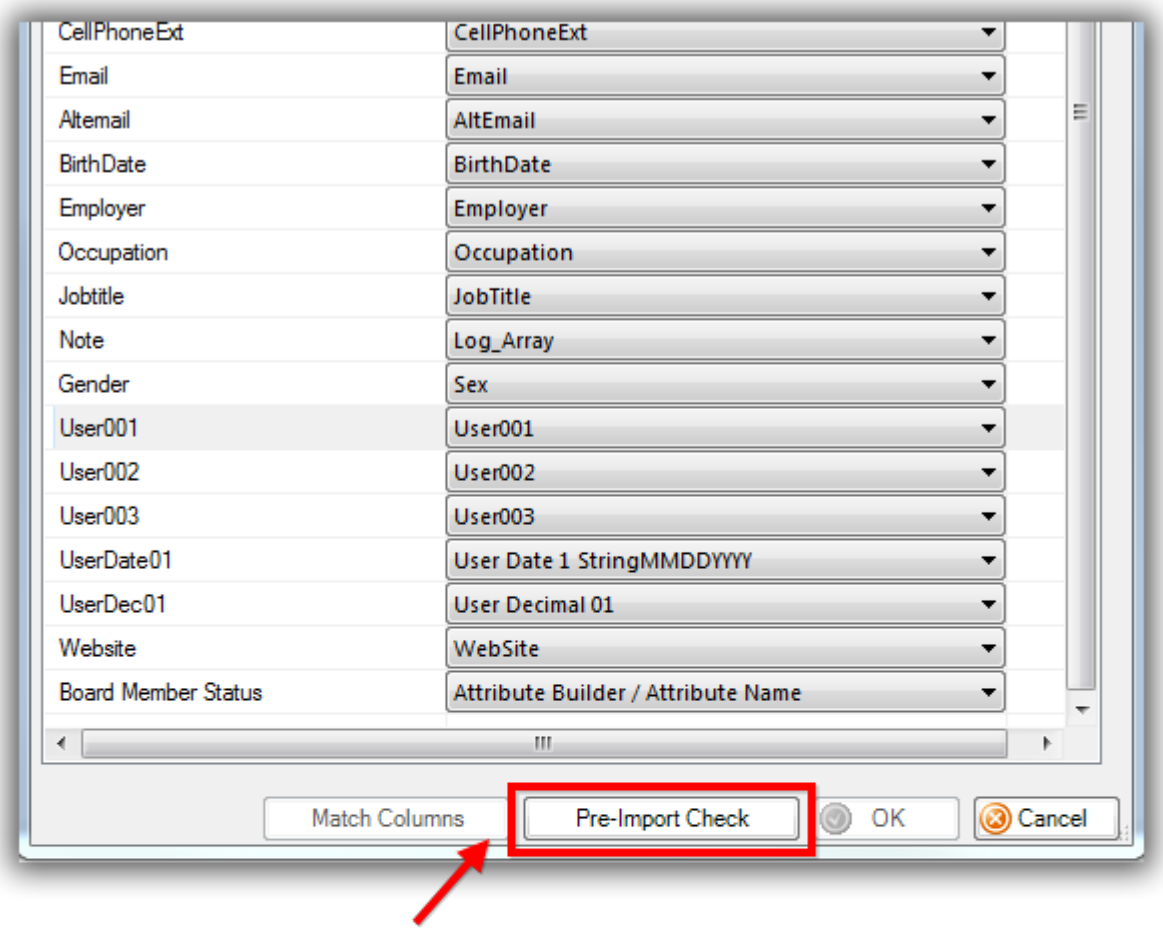
Img 2 of 2 - Column mapping of contact data into Trail Blazer.



***This import includes:**
- (3) User Fields
- (1) User Decimal Field
- (1) User Date Field
- (1) Attribute Item

‹b

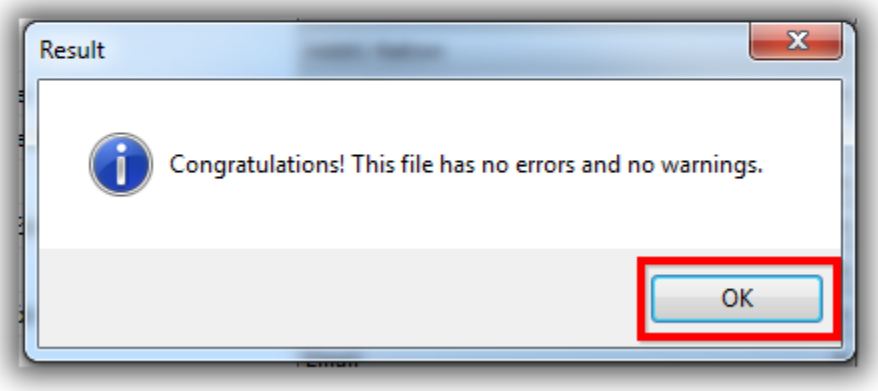
Once you finish the column mapping click the **[Pre-Import Check]** button which will scan your .csv file to check for any issues that will cause the import to fail (***errors***) and any other data you may want to cleanup prior to importing (***warnings***).



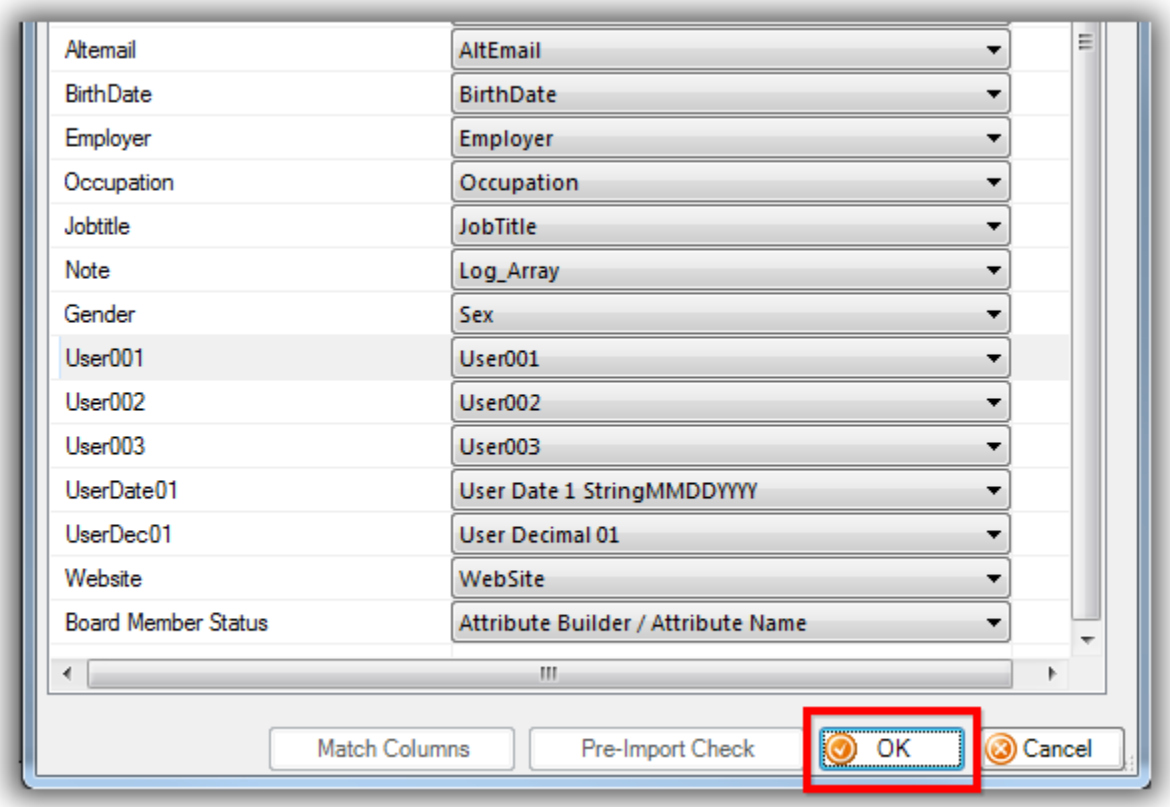
The pre-import check will scan your .csv file for 'errors' that will cause the import to fail and 'warnings' which should be cleaned up. The end goal is to get 0 errors and 0 warnings prior to running your final import.

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.

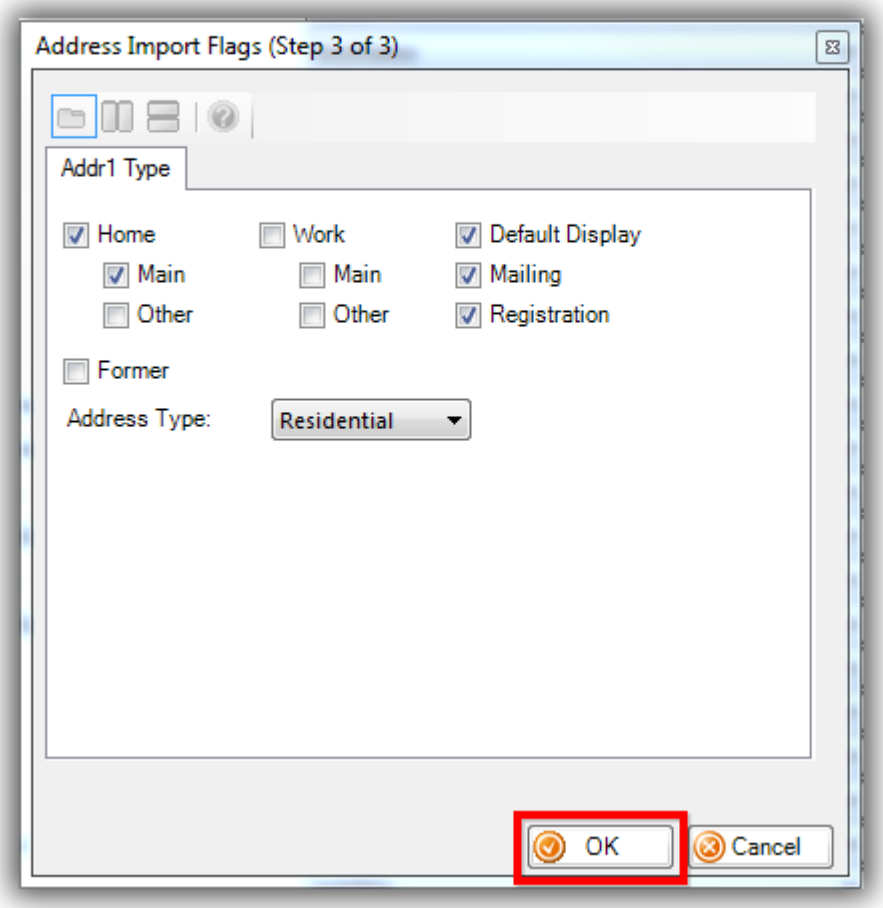


Click **[OK]** again on the column mapping screen.



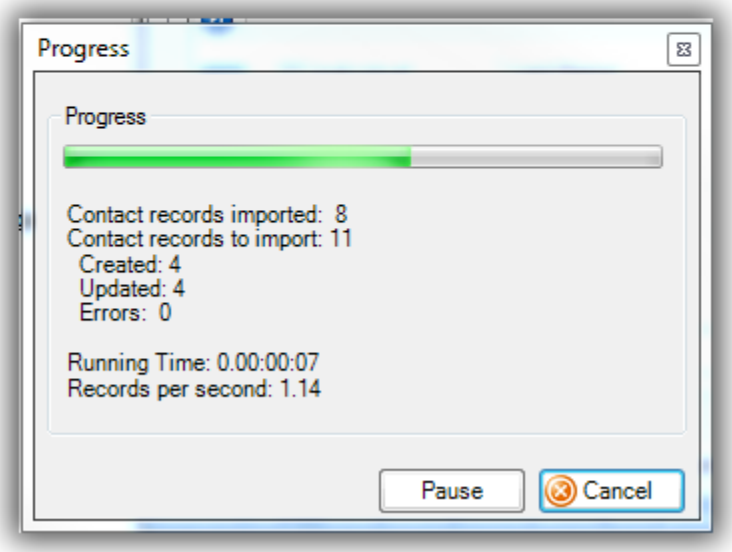
If* you are importing an address(s) you'll get another screen for the address mapping i.e. Mailing, Work, Home, etc. Check the corresponding boxes for the type of address(s) you're brining in and click **[OK]. *In my example I brought in a single address that I mapped to Home/Default Display/Mailing,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



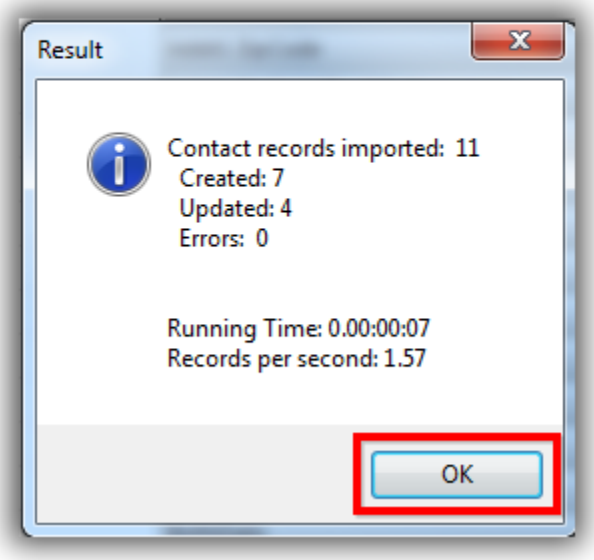
The import will commence, you'll get a status screen that displays how many records have been created, updates, as well as any errors that are taking place. If you are getting errors that weren't caught during the pre-import check you'll want to pause and cancel the import to fix the original data set.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



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.*

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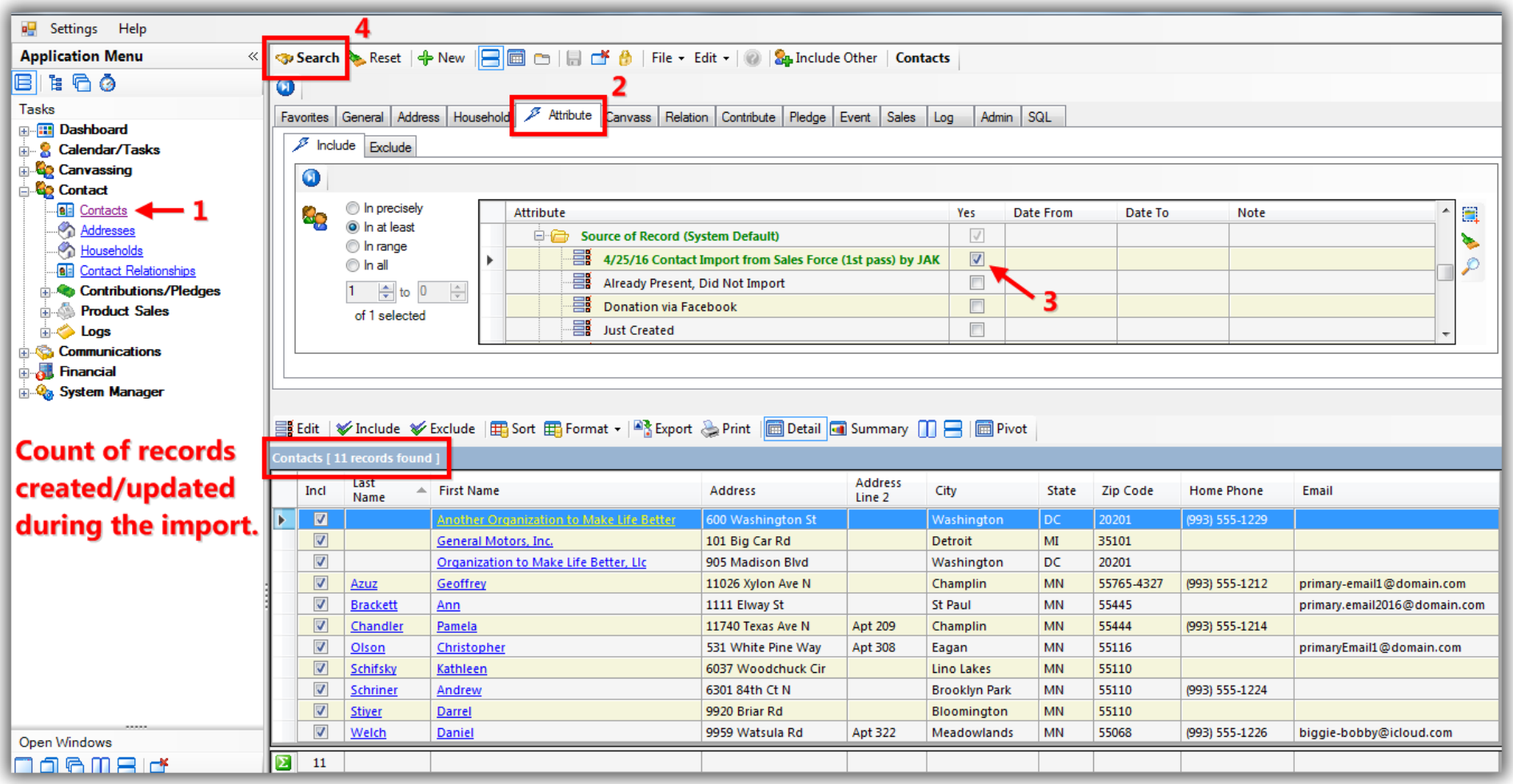

If the import was a success you're finished. If it went awry you can roll-it-back with the rollback utility.

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 (support@trailblz.com) 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.

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- Leading0s – Retaining When Opening CSV Files In Excel
Video: Importing Contributions

Trail Blazer Live Support

- **Phone:** 1-866-909-8700
- **Email:** support@trailblz.com
- **Facebook:** https://www.facebook.com/pages/Trail-Blazer-Software/64872951180
- **Twitter:** https://twitter.com/trailblazersoft

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Click here 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 GoToMeeting session where we host our live interactive trainings.*

** This service is included in your contract.*