



QUICK FIND: Contacts tab, *Import New*

KEY TERMS:

.CSV file	SFTP
Attributes	New/Known Layouts
Filter	Import File Delimiter
Update Conditions	Rules

IMPORT RULES:

Import Selective - These control how the values of an imported record update a matching existing record. Null values for an imported record will NOT replace existing values in the existing record. (Specific to attribute)

Import Required - If the specified field is empty (or null) in the import record, that record will not be imported. If this is null, the entire row will be rejected.

Import Overwrite - All possible values (including a null or empty value) in the imported record will replace the existing value in the matching record. (Specific to attribute)

Import if Null - This option will import the data from the file into Connect only if there is no data in Connect. If there is data in Connect and data in the file, no updates will happen to the data in Connect. (Specific to attribute)

Do Not Import - This limits the data that is imported into Connect. You can also use this to ignore certain fields within the file. (Specific to attribute)

THINGS TO REMEMBER:

1. Review your file before you import it in Connect. You'll want to clean up the data and make sure it's formatted appropriately.
2. Make sure your Excel file is saved as a .csv file or delimited prior to trying to upload to Connect.
3. You can view your layouts under Imports if you click on the Plug-ins/Known Layouts.
4. Once the import is complete you'll want to check the import log for any data that was rejected.

FREQUENT REJECT REASONS:

1. E-mail: Invalid E-mail address
2. State/Province: This choice option is not valid
3. Zip: Size greater than ten
4. Insufficient columns
5. Data violates unique constraints

NOTES: