CRW305 Work with Contact Import

Overview   Contact Import allows contacts to be imported from a CSV file into the contact files in CRM using the Import file CRCI00P. The "Load" option in the program loads the data and validates it as well. Status indicates the upload. Errors and duplicates are highlighted. The validated data can be transferred to create contacts individually or at header level.

Examples

This section illustrates examples concerning:

Example 1: Transfer data to PC

Example 1: Transfer data to PC

This example describes how to transfer data to PC.

1. Select Download the CRIC00P file from the IBM POWER SYSTEM to the PC as an Excel (CSV) file and create a CRIC00P.fdf (transfer) file using the Receive Files from Host option making the following changes. This will be necessary for the first time only. After the initial creation the 'Receive files from host option' would be used for the download without changes.
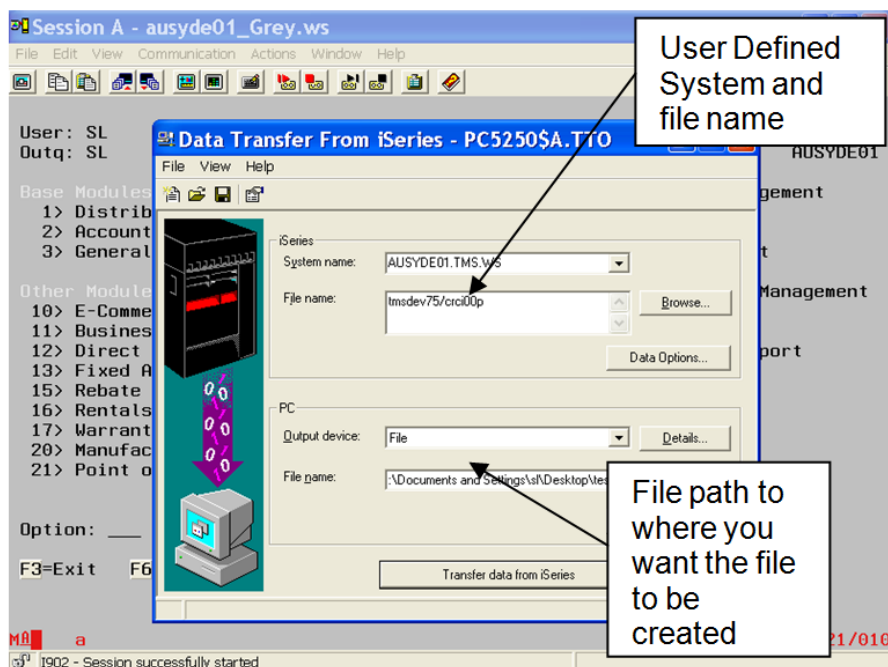
2. Make the following file changes using the **Details** button.
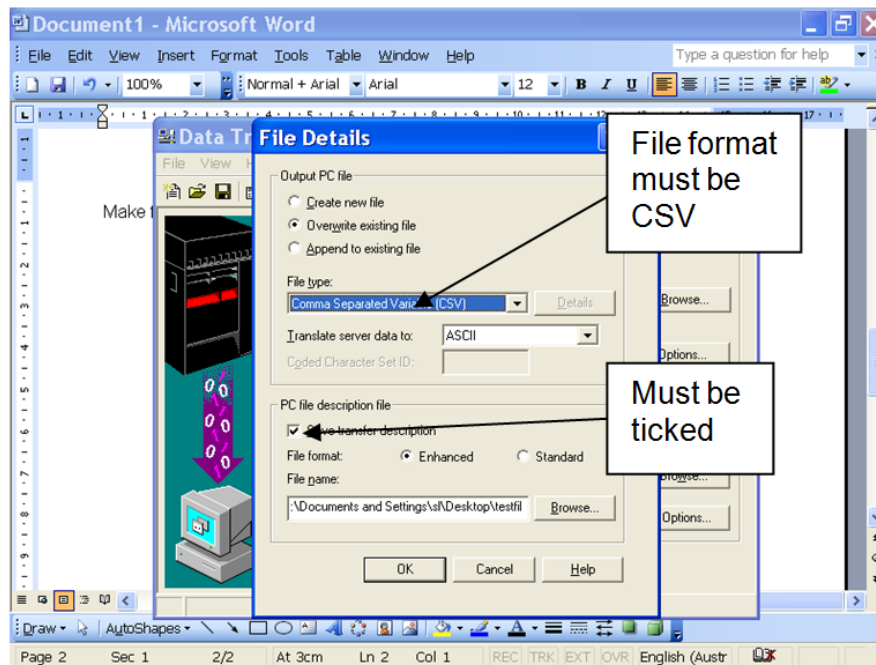
3. Make the following Format changes using the **Format** Options button.
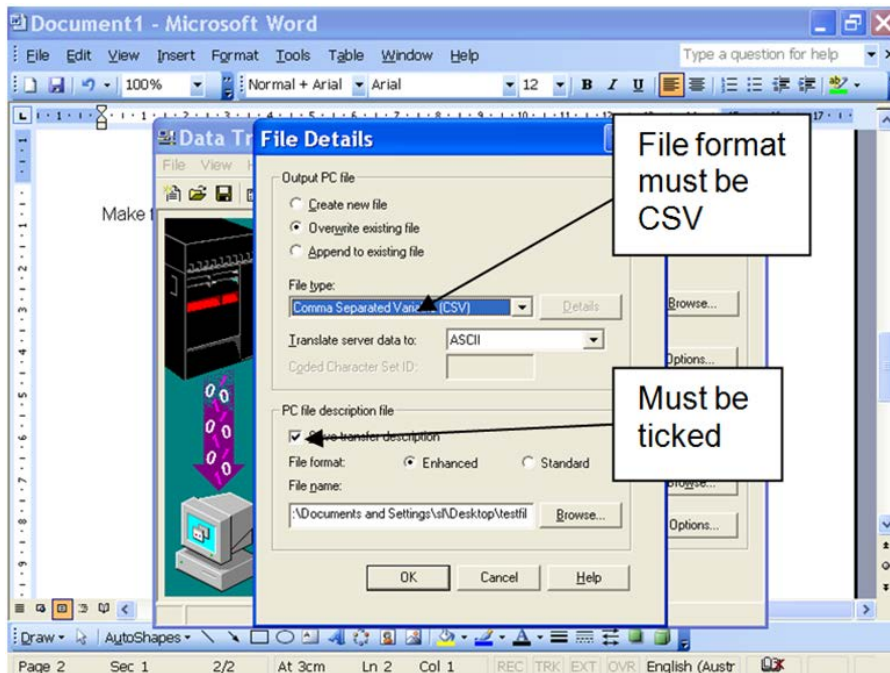
4. Click **OK** to accept format changes.

5. Click transfer data from IBM Power System.

The file created will be the format in which the received data must be placed. This will allow the fields in the contact and various interest codes to be uploaded.

When the excel spreadsheet is filled with data, the user file should be uploaded to the IBM POWER SYSTEM using the 'Send files to host option'.

Once the file has been uploaded to the IBM Power Systems, the following options need to be taken.

Example 2: Add a new batch

This example describes how to add new batch to link the new file to.

1. Select option **CRM Contact Import** from Publishing Modules>Customer Relationship Management>CRM Other Maintenance menu.

CRW305 Work with Contact Import main panel is displayed.
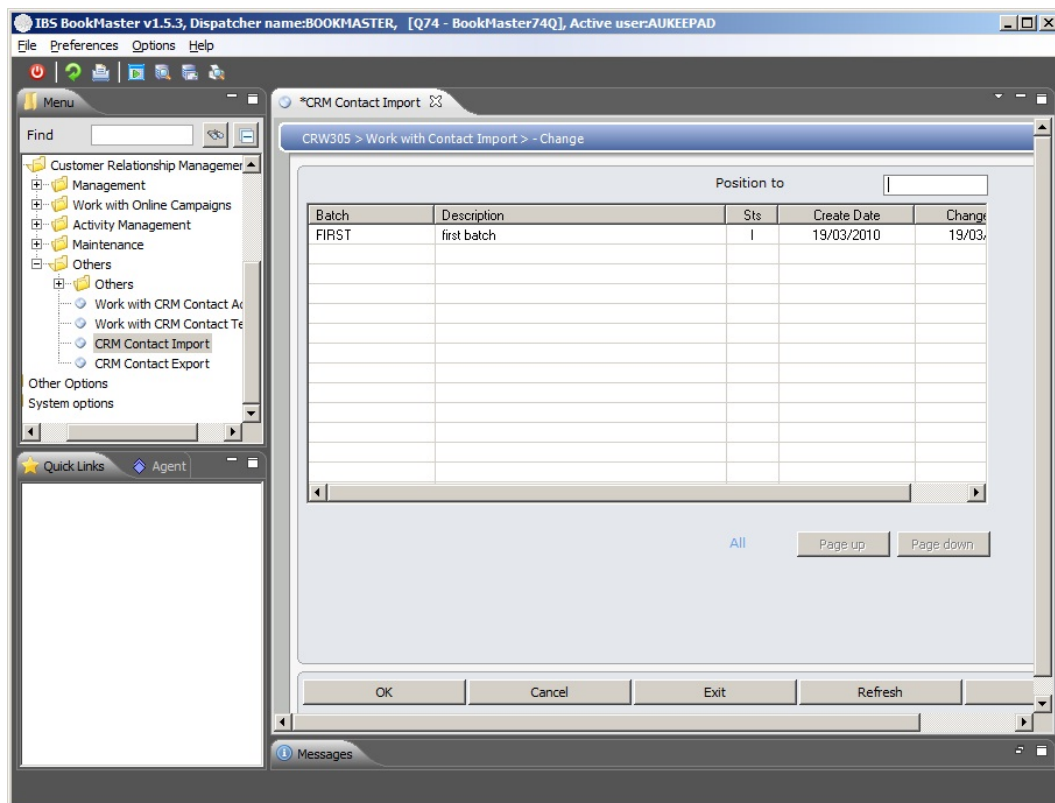
Options

Change	Access Work with Contact Import in change mode to maintain the Batch Header.
Load	It loads the data into the batch in use.
Detail	Displays the list of contacts from the selected batch in maintenance mode.
Review	Access Work with Contact Import to review the Batch Header.
Transfer	It transfers the valid records from the batch (With status 'V') to the contact file.
Unlock	Access Work with Contact Import to unlock the Batch Header.

Purge	The complete batch is purged if desired.

2. Click **Add** function.

CRW305 Work with Contact Import panel is displayed.

Relevant fields

| Batch	Batch number given to contact import
Description	This is a brief description of the issue, template or action being created. When exporting information to Excel a description can be exported.
Load status	A status given to the import load. The first load is given a status of Initial. While the load is in process, the status changes to In Progress
In use	Determines whether the import is in use. While the import load is in processing, 'In use' flag displays that the batch header is in use.

3. Fill all the required fields, click **OK** and new batch is added.

Example 3: Load a new file into a batch

This example describes how to load a new file into a batch.

1. Once a new batch header has been added in example 2, the new file is loaded into the newly created batch. Select the batch the new file is being loaded into and click **Load**.

Confirmation panel asking for confirmation to load is displayed.
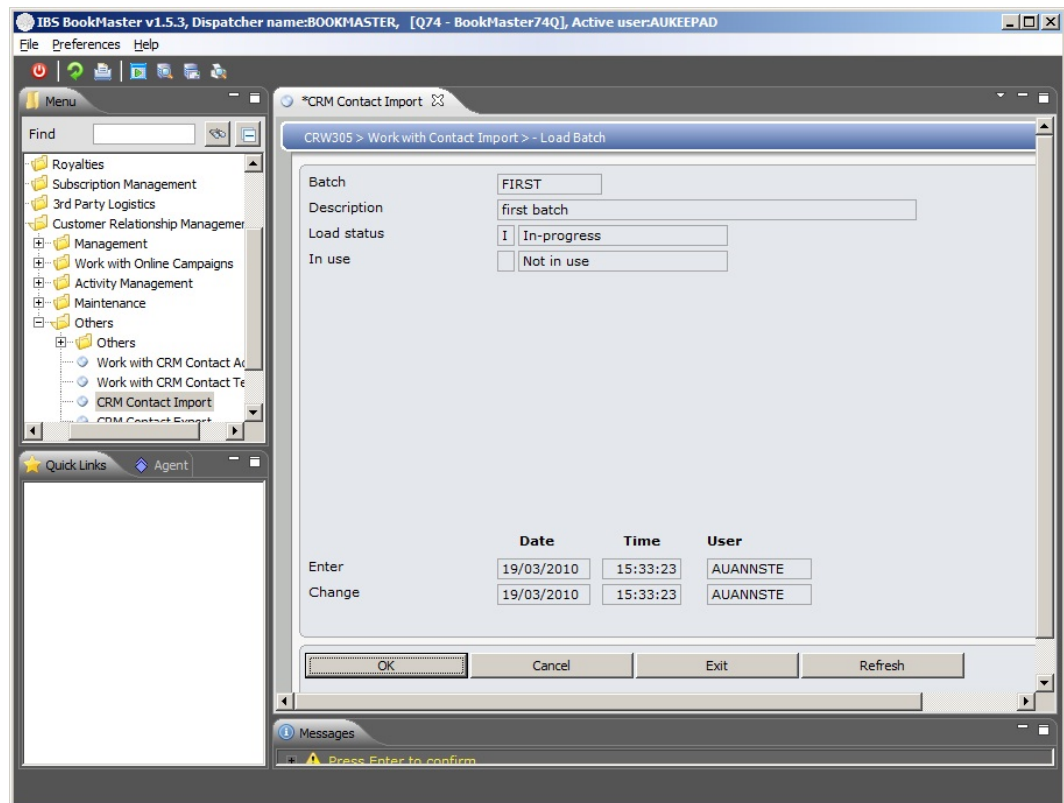
2. Check the batch to ensure the data has been loaded successfully. While loading, system also validates the data and changes from a blank status to I=In Progress when the load is complete.
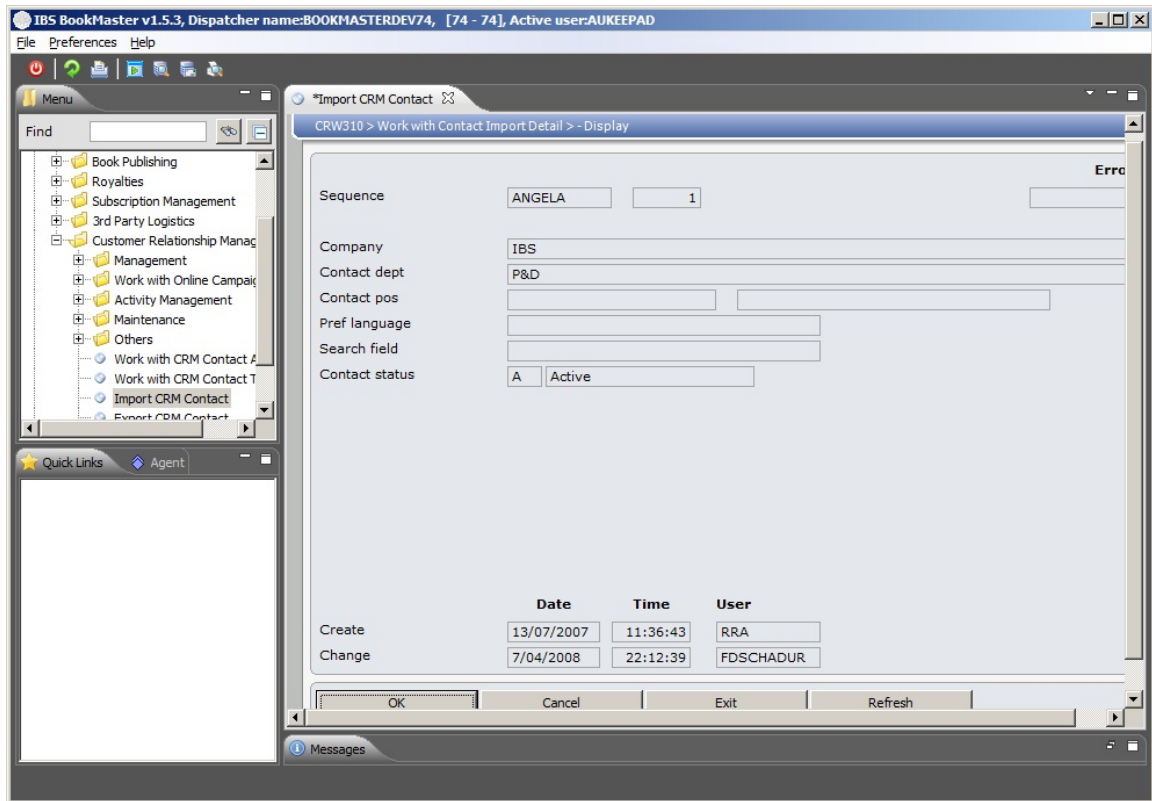
Example 4: Check Imported data

This example describes how to check imported data.

1. Select the batch name to be checked and click **Detail**.

CRW310 Work with Contact Import panel is displayed.

This panel lists Contact names and their status. Status 'E' besides contact indicated there is an Error.

Options

Fix Error	Access Work with Contact Import Detail to fix the errors present in contact masterfile for particular contact.
Del-Undel	
Detail	Access Work with Contact Import Detail in inquiry mode to display contact details.
Classifications	Access Work with Import Contact Classification in inquiry mode to display contact classification details.
Match Key	Access Contact Import Match Key in inquiry mode to display contact and its match key details.
transfer	It transfers individual valid records (with status 'V') from a batch to a control file.

2. Select the record with an 'E' status and click **Fix Error**. The errors for the record are displayed. Refer to document **CRW310-Work with Contact Import Detail** for further details.

Once data has been corrected the record status moves from 'E' to 'V' for Valid records. Once the data has been moved to status 'V' the transfer option can be used to transfer the valid data to the Contact File.

Example 5: Transfer data to the Contact File

This example describes how to transfer data to the Contact File.

1. To Transfer an entire batch to the Contact file select the batch to transfer and click **Transfer**. To transfer individual records, select the batch as above and click **details**. The list of Contacts displays. Select individual records and click **Transfer**. Panel asking for confirmation is displayed. Click **OK** to confirm the transfer the batch.

Once all records have been transferred the status of the individual records will change to T=Transferred and the status of the batch will change to C=Complete. This would happen only if all records have been transferred. Once complete the data in the batch can be purged if desired, by selecting the batch and clicking Purge. This option can be used only if the status is C=Complete.

Example 6: Contact import purge

This example describes how to purge contact imports when the import has been completed.

1. Repeat Step **1** as in .
2. Select the required batch and click Purge option.

CRW305 Work with Contact Import panel to confirm the purging will be displayed.

3. Confirm the purging by pressing **Enter**.