Contact and Export Update

Overview

This import tool enables users to maintain the **Export Reference IDs** and **Sales Contacts** of multiple end user accounts at once.

Business Rules

The following business rules apply when using this tool.

- The **Account ID** is an existing account and is a child account of the account of which uploaded the file.
- The **Sales Contacts** and **Credit Manager** are existing contacts.

Licensing

This feature is available to subscribers of the following:

- [x] Emersion Core
- [ ] Optional Modules
- [ ] Upon Request (please contact your Account Manager)

Import Result Notification

This feature utilises the **Bulk upload processing notification event** (event type 963) to send a notification to the user containing the results of the import attempt.

- If the import is successful, the email notification will advise you when the import process is complete.
- If the import is not successful, the email notification will send details of the records that failed validation and why.

An event template must be created and the event must be *enabled* before the import tool can be used.

Preparing Data for Import

To prepare your data for import, you will need to create a CSV import file or you can download the import file below. You will need to extract the csv file and save it.

A hard limit of 5,000 rows is supported via this tool, including the header row.

If you need to import more than this, create multiple import files and process them one-by-one.

Download the contact and export update import template.

Importing The Data

To access the import tool:

Admin > Bulk Import > Contact And Export Update

1. Click the **Browse** button and select the csv file containing the data you want to import.
2. If you want the bulk upload processing notification email to be sent to a different email address than the address defined in the event template, tick the **Override?** checkbox and enter an alternative email address. This will only apply for this upload. To change the email address for all future imports, you will need to change the recipient defined in the event template.
3. Press **Submit**
4. The system will validate the data and if no errors are found, the system will import the data. When the notification email is received, the process has been completed.

Validating the Import

Bulk Import Validation

The system will parse the data for invalid formatting only. It cannot check for data accuracy. It is strongly recommended that you check the imported data to ensure that the data was accurately imported. To do this, divide your import records into groups of 20. Check a single record in each group. If an error is found, check each previous record for the group until you find the one that was imported incorrectly.

If you find an problem, you cannot roll back the import. You have two options should this occur:

1. Manually correct the data.
2. Request Emersion fix the errors for you.

Any request to correct imported data must be made to Emersion. Emersion will provide an estimate of the work and a quote. Quote must be approved *in writing* before any work commences.

Data Definition

This section contains a list of the required fields and a definition of what the system considers as valid inputs.

Data field	Description	Mandatory?
Account ID	Emersion Account ID.	Yes.
Export Ref*	Export Reference code. Used to store a code or ID from another system.	No.
Sales Person*	The manager for this account. Used to store a name, code or ID from another system.	No.
Sales Contact 1*	Contact ID belonging to the Sales Contact 1.	No.
Sales Contact 2*	Contact ID belonging to the Sales Contact 2.	No.
Credit Manager*	Contact ID belonging to the Credit Manager.	No.
CRM Export Ref ID*	Export Reference code for a CRM. Used to store a code or ID from another system.	No.

** These values can be cleared by setting them to the word "remove", without the quotation marks.*

Viewing Imported Data

After importing data it is important to validate it was imported correctly. Choosing a random records and performing a visual check in Cumulus should reveal any mistakes relatively quickly that would be harder to see in an import sheet.

Account Managers and Export References can be viewed using the Export Reference and Account Manager report.

Access Control

The following powers are used to govern access to this tool

- Bulk Import - Contact and Export Update

Related Pages

- ConnectWise Company and Contact Settings
- Contact and Export Update
- Addresses
- Address Import For Organisations, Account and Service Contacts
- Map Company Status
- Map Communication Types
- Migrating Account and Contact Data
- Phone Number and Fax Fields
- Contact Importer
- Opening Balances
- Contacts
- ConnectWise Contacts Data Mapping
- Contact Form Identification Fields
- Using Groups to Migrate Customers from Xero to Emersion During Onboarding
- Link an Emersion Account to a Netsuite Customer