

Importing existing contact records

Version V3.11.00: 20 April 2012

General

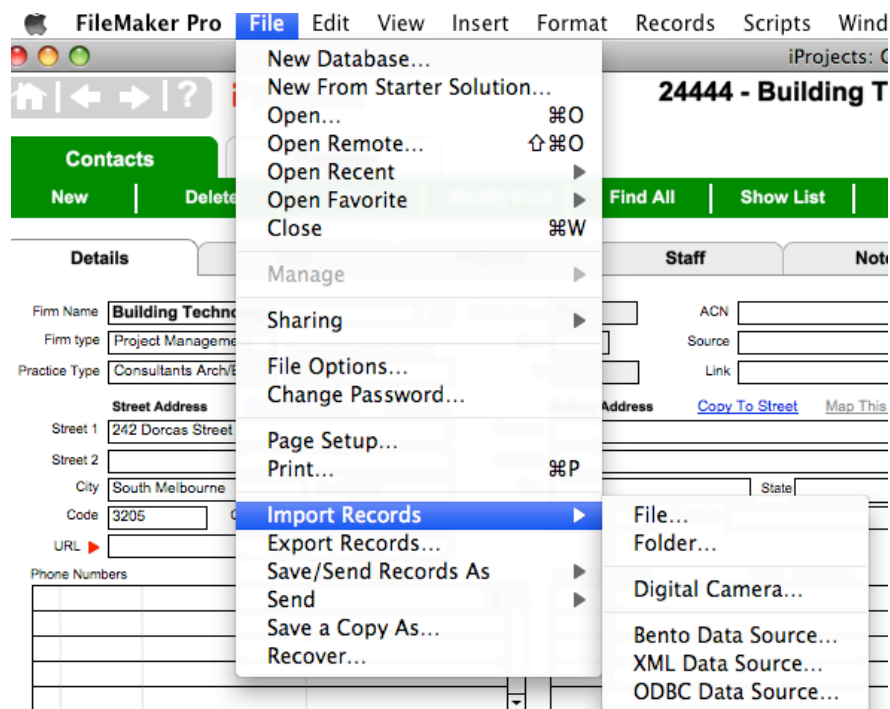
Importing existing contact records from another FileMaker™ database is easy, provided that you align export and import fields. A guide is included below. You will need to import Firm records first; person records second (so there is a firm for the person record to link to).

However, most firms will have some other contact system, which could have any one of numerous platforms. The directions below will help you to get the import “right first time”, provided you follow the instructions carefully. You’ll still use the instructions for a FileMaker™ input, but you will need an intermediate Excel™ file, which **iProjects** provides.

Importing existing FileMaker contact records

To import existing contact records you will need to (from FileMaker™):

Click on **File**, on the FileMaker™ menu bar and select from the drop down menu “**Import Records**”.



Choose your data source from the options of **File**, **Folder** etc, as per above.

There is extensive online Filemaker help in regard to importing records from the above sources. *All care should be taken when importing records.* Please familiarize yourself with the “do’s and don’ts” before proceeding.

Importing other Contact records

Before doing the import described about, you will need an intermediate step: Using the Excel™ templates provided by iProjects (which you can download from the website under **Resources > Downloads**).

Virtually any other database can export to Excel™, which is why we use it as an intermediate “filter”. These are:

iProjects_Firms.xls

iProjects_Persons.xls

The Firms spreadsheet looks like this (but is much wider):

	A	B	C	D	E	F	G	H	I	J	K
1	Firm ID	Firm Name	Tax Code	Practice Type	Street 1	Street 2	City	State	PostCode	Country	URL
2	123	Insightful Systems	123 456 678	Systems Development	1 Queens Road	Suit 105	Melbourne	Vic	3004	Australia	www.insightfulsystems.com.au
3	456	Switched On Knowledge	897 656 654	TM	58 Clarke St		Melbourne	Vic	3000	Australia	www.switched-on.com.au
4											
5											

You will use the Firms Import spreadsheet first, aligning your export records to the corresponding import fields in the Excel™ template. Then import this data into iProjects, using the guide described on p1 of this UserGuide.

Your existing database won't have fully matching fields; leave those blank for which there is no match.

Then repeat the process with the Persons Import spreadsheet, which is similar, but of course is set up for person rather than firm data.

After your import, check a number of records to ensure that the import went smoothly. If you followed the directions carefully, you should have no problem.