

Resource Importer Walkthrough - Step 1

Importing Resources

Before You Begin

Ensure that you are familiar with the overview and "Before you Begin" requirements listed on the [Resource Import Tool](#) page.

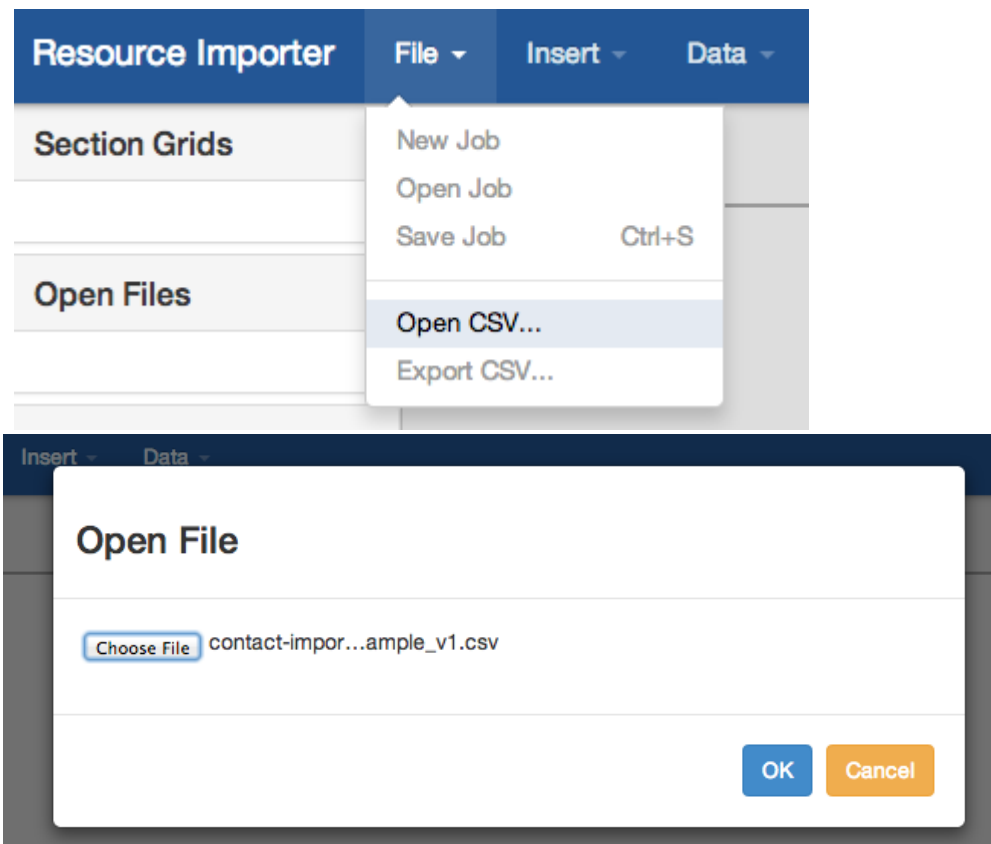
For this tutorial, we will be using the Contact Import Sample .csv available on the [Import Templates](#) page as an example, and associating it to an existing Section called "Contact" having the fields: First Name, Last Name, Email, 2nd Email, Phone, 2nd Phone, Mobile Phone, Role, and Time Zone. To create this Section, or edit an existing Section, refer to [Working With Resources](#), [Customizing Sections](#), and [Customizing Fields](#).

In order to illustrate the abilities of the Resource Importer to edit data and adjust for formatting issues, the Contact Import Sample .csv is used intentionally leaving a few less-than-ideal conditions (much like you may encounter in real life) such as leaving typos, having an extra data column, and missing a needed column. If you follow the "Before you Begin" requirements and "Best Practice" notes, however, you may be able to skip any editing or column adjustment steps.

When you are ready to begin, open the Resource Importer and proceed to Step 1.

Step 1: Upload your .csv data file

Under the "File" Menu, select "Open .csv". Browse to and select your UTF-8 encoded data file.



After hitting "OK", your file should be visible in the workspace, as well as listed under "Open Files" like this:

Resource Importer

File - Insert - Data - Help -

Exit Import Tool

Section Grids

contact-import-sample_v...

menu

+

#	<input type="checkbox"/>	Unique ID	First Name	Last Name	Title	email	email2	Phone	Phone
0	<input type="checkbox"/>	6c-004	Aaron	Hughes	CTO	aaron@gmail.com	support@gmail.com	1-408-555-1212	1-408-555-1212
1	<input type="checkbox"/>	6c-004	John	Parker	Sales	john@gmail.com		234.634.1234	888-cal
2	<input type="checkbox"/>	6c-004	Tom	Taylor	Janitor	ttaylor@toms.com		503-555-1256	866-55
3	<input type="checkbox"/>	6c-007	Bob	Smith	VP Ops	bsmith@apple.com		888-call-now	703-55
4	<input type="checkbox"/>	6c-008	Maurice	Carmichael	Marketing	mc@mail.com		866-555-1134	888-nic
5	<input type="checkbox"/>	6c-009	Vince	Bunch	Marketing	vbunch@happyplace.com	ops@happyplace.com	703-555-1111	234-55
6	<input type="checkbox"/>	6c-010	Mark	Tompson	Product Manager	tompson@t.net		888-nice-wor	354-55
7	<input type="checkbox"/>	6c-011	Herold	Waters	Engineer	hwaters@is.co.uk		234-555-6678	17 145
8	<input type="checkbox"/>	6c-012	Michael	Sanders	Project Manager	pm@mybusiness.com		354-555-1235	234-23
9	<input type="checkbox"/>	6c-013	Jill	Keller	Operations	jill.keller@another.com		17 145 125124	44 123
10	<input type="checkbox"/>	6c-014	Sarah	Campbell	Account Executive	sa.camp@intel.net		234-234 1234	888-cal
11	<input type="checkbox"/>	6c-015	Amanda	Kingson	Sales	akingston@sellin.com		44 123 555 12	866-55

Open Files

[contact-import-sample_v1.csv](#)

Local Grids

Completed Imports

After opening your .csv grid, proceed to [Step 2 - Open a template grid from an existing Section](#)