

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.

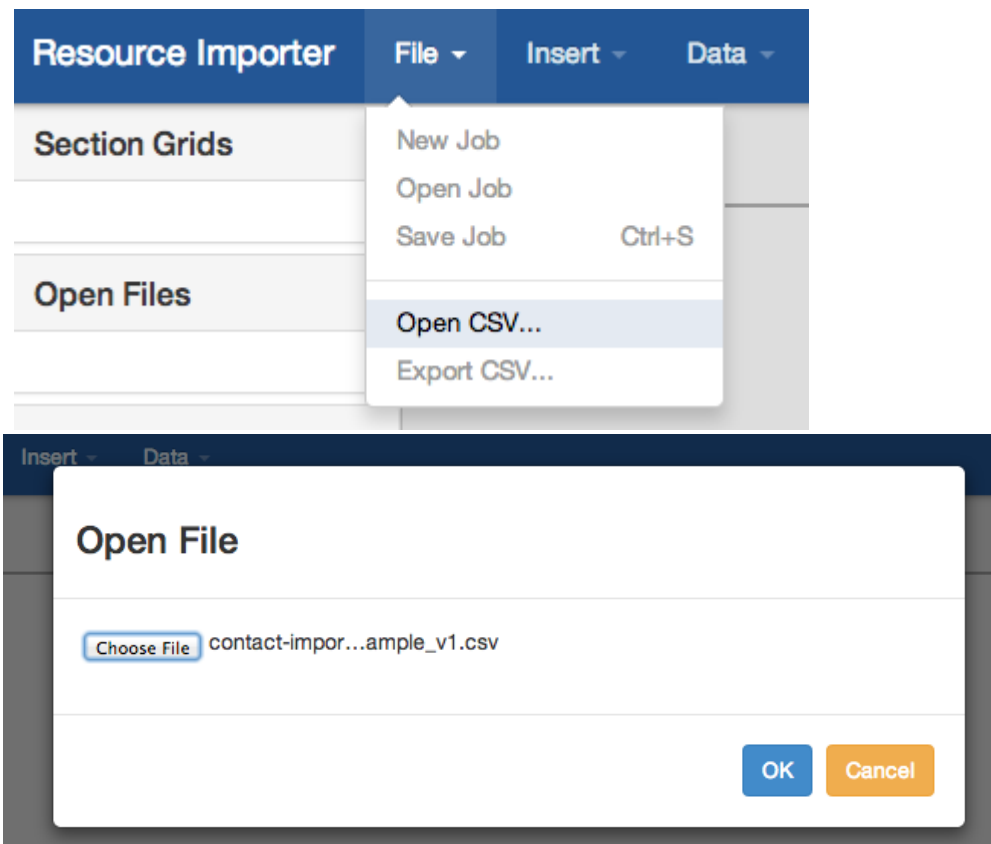
For this tutorial, we will be using the Contact Import Sample .csv available on the [Import Templates](#) page as an example, and associating it to an existing Section called "Contact" having the fields: First Name, Last Name, Email, 2nd Email, Phone, 2nd Phone, Mobile Phone, Role, and Time Zone. To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

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