

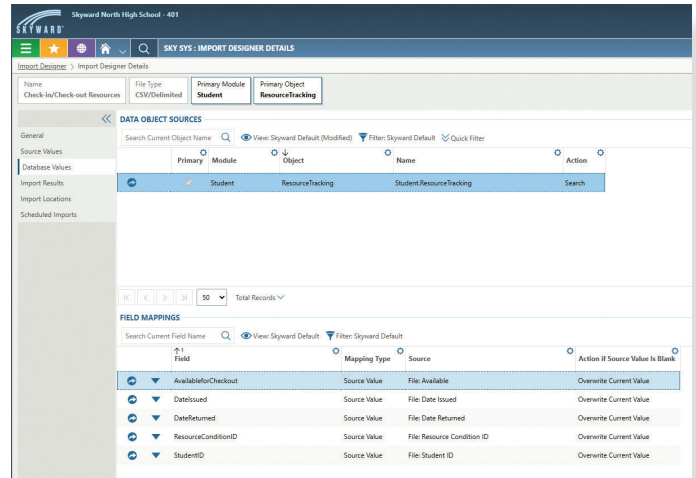


TECHNICAL

IMPORT DESIGNER

CUSTOM CREATE IMPORTS TO MATCH DESIGNATED IMPORT FILES

- Custom design templates to align with the records you want to import
- Import data from a file into the system to create new records or update existing records
- Schedule the import to save time from manually running imports or to easily pull from a secured FTP/SFTP folder



IMPORT TEMPLATES VIA THE IMPORT DESIGNER

Looking for a way to import data from a file but don't see an existing import to pull the data you are looking for?

Custom create an Import file template within the Import Designer and import data from a file into the system. Create new records or update existing records in the software, including customized fields. The File Types available to import include .txt, .xlsx, and .csv. The data in the file will be mapped to Objects and Fields you specify to connect where the information will be stored in your database. For example, when setting up a new database, you may have a file containing ZIP codes your users will be expected to use. You can create an import file template to import the data from the ZIP code file to create ZIP code records in the software automatically, rather than manually adding them.

To help save on time, if you need to create an import file similar to an existing template, you can clone the template instead of creating a new one. Additionally, you can schedule imports enabling the system to import files automatically. Enter a file location for the import or add an FTP/SFTP or UNC path and designate the frequency like once, daily, weekly, and monthly.