Importing contacts and activities

Using the Healthwatch Civi CRM

About this resource

There are occasions when you will want to add more than one contact or activity at a time to your CRM. For example, if you are just getting started using the CRM, or if you have a group of new volunteers joining your team.

This resource talks you through how to import contacts and activities.

Importing contacts

Preparing your data

To be able to import contacts or activities, you will need to have administrator rights. Check to see whether you have these permissions by going to the Contacts tab in the menu.
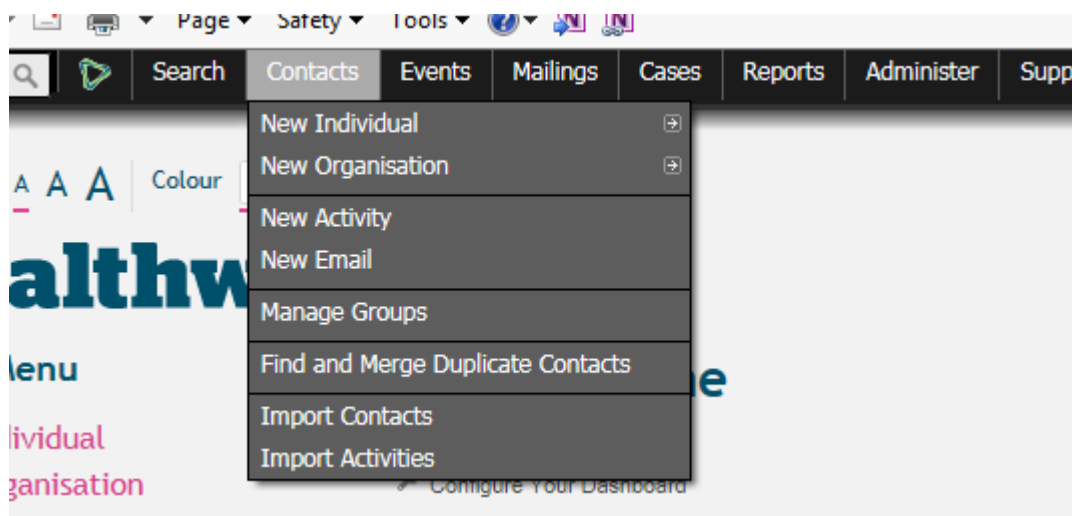
Importing contacts and activities both use the same process, in this example we will look at importing a list of existing contacts.

Your contacts need to be in an excel spreadsheet (in csv format) to import.

You need to format this correctly, so that each piece of information is in a separate column, like the table below.

first_name	last_name	email	street address	city
Bobby	Gomez	bgomez4@illinois.edu	31 American Road	Newtown
Gloria	Burton	gburton5@fc2	28 Hermina Road	Milton
Timothy	Kelly	tkelly6@reddit.com	5 Summer Ridge Parkway	Aberdeen

You can import as many columns as you want to, with a file size of up to 2MB.

If your file is larger than 2MB, you should split it into two or more pieces and import each separately.

Performing the import

When importing contacts, it's important to remember that you cannot import organisations and individuals at the same time, you must import them separately.

The exception for this is if you are importing an organisation as being a relationship to an individual. The organisation will be created in the system and linked to the individual but there will be no details attached to it.

- When clicking 'Import Contacts', you first of all come to the screen below:

Choose Data Source (step 1 of 4)

The Import Wizard allows you to easily import contact records from other applications into CiviCRM. For example, if your organization has contacts in MS Access® or Excel®, and you want to start using CiviCRM to store these contacts, you can 'import' them here. ❓

[Continue] [Cancel]

Choose Data Source

Data Source * [Comma-Separated Values (CSV) ▾] ❓

Upload CSV File

Import Data File * [   ] [Browse...]
File format must be comma-separated-values (CSV). File must be UTF8 encoded if it contains special characters (e.g. accented letters, etc.).
Maximum Upload File Size: 2 MB

☑ First row contains column headers
Check this box if the first row of your file consists of field names (Example: 'First Name','Last Name','Email')

Import Options

Contact Type ⦿ Individual ○ Household ○ Organisation ❓   Subtype [- select - ▾] ❓

For Duplicate Contacts ○ Skip ⦿ Update ○ Fill ○ No Duplicate Checking ❓

Dedupe Rule [Name and Email (reserved) - Supervised ▾] ❓

Import Field Separator [,] ❓

Date Format ○ yyyy-mm-dd OR yyyymmdd (1998-12-25 OR 19981225) OR (2008-9-1 OR 20080901)
○ mm/dd/yy OR mm-dd-yy (12/25/98 OR 12-25-98) OR (9/1/08 OR 9-1-08)
○ mm/dd/yyyy OR mm-dd-yyyy (12/25/1998 OR 12-25-1998) OR (9/1/2008 OR 9-1-2008)
○ Month dd, yyyy (December 12, 1998)
○ dd-mon-yy OR dd/mm/yy (25-Dec-98 OR 25/12/98)
⦿ dd/mm/yyyy (25/12/1998) OR (1/9/2008)
Select the format that is used for date fields in your import data.

☑ Geocode addresses during import?
This option is not recommended for large imports. Use the command-line geocoding script instead. (learn more...)

Load Saved Field Mapping [select ... ▾]
Select Saved Mapping or Leave blank to create a new One.

- The Data Source defaults to CSV, and then you upload your file. If you have headers along the top of your file, then you should tick the 'first row contains column headers' option.

- Select whether you are importing individuals, households or organisations. You can also have them given subtypes while you are importing them: for example, you may wish to import a list of your volunteers and can choose to have them all imported as such.

- To avoid duplicate contacts, choose either 'Skip', 'Update' or 'Fill' so that all contacts are checked against the existing data before they are imported. You can set your dedupe rule as well; the most commonly used ones involve checking the contact against email address as, unlike names and addresses, they are unique to one person.

  When importing contacts, it is not important which date format you choose: this is more important when importing activities.

- Finally, if you have mapping already saved from previous imports that you wish to reuse you can choose it and reuse it rather than creating mapping a new set of fields.

- Click 'Continue' and the following appears:

Column Names	Import Data (row 1)	Import Data (row 2)	Matching CiviCRM Field
first_name	Bobby	Gloria	First Name (match to contact) *
last_name	Gomez	Burton	Last Name (match to contact) *
email	bgomez4@ucl.ac.uk	gburton5@fc2.com	Email (match to contact) * Home
street address	31 American Road	28 Hermina Road	Street Address Home
city	Newtown	Milton	City Home
postcode	RG20	NG22	Postal Code (match to contact) Home
employee of	Cummerata-Welch	Monahan, Veum and Lueilwitz	Employee of Organisation Name (match to contact) *
job title	Social Worker	Programmer Analyst I	Job Title
do not email		1	Do Not Email
telephone	44-(897)558-9166	44-(384)163-6097	Phone (match to contact) Home Phone
Source	Salesforce	Salesforce	Source of Contact Data

☐ Save this field mapping

[‹ Previous] [Continue] [Cancel]

- The CRM automatically matches up fields it recognises, such as email addresses and names.

  As you can see, there are extra options for addresses and phone numbers – these can be work or home.

  As on the import there is also the organisation the individual works for, this is created through using the relationship 'Employee of' – when selecting this another field automatically appears to put the organisation name in.

- It is good practice to enter where your data comes from so that you have a record of it: for example, if you have held a session at the local library to sign up volunteers and you want to import their details all at once, you may want to put that event as the source of the contact data.

- When you click Continue, the following screen will appear:

| Previous | Import Now | Cancel |

| Total Rows | 3 | Total number of rows in the imported data. |
| Valid Rows | 3 | Total rows to be imported. |

Column Names	Import Data (row 1)	Import Data (row 2)	Matching CiviCRM Field
first_name	Bobby	Gloria	First Name (match to contact)
last_name	Gomez	Burton	Last Name (match to contact)
email	bgomez4@ucl.ac.uk	gburton5@fc2.com	Home -Email (match to contact)
street address	31 American Road	28 Hermina Road	Home -Street Address
city	Newtown	Milton	Home -City
postcode	RG20	NG22	Home -Postal Code (match to contact)
employee of	Cummerata-Welch	Monahan, Veum and Lueilwitz	Employee of - Organisation Name (match to contact)
job title	Social Worker	Programmer Analyst I	Job Title
do not email		1	Do Not Email
telephone	44-(897)558-9166	44-(384)163-6097	Home -Phone -Phone (match to contact)
Source	Salesforce	Salesforce	Source of Contact Data

▸ Add imported records to a new group

▾ Add imported records to existing group(s)

| | |

▸ Create a new tag and assign it to imported records

▸ Tag imported records

- The system checks the rows of data, and if any are invalid (such as a space in an email address) there will also be a row with invalid rows from which you can download a report on which ones are invalid, and make corrections to the original spreadsheet.

- You can also add the records to a new group, an existing group, a new tag or an existing tag.

- After clicking on 'Import Now', your import will begin. This shows on your screen as a bar with a percentage, to show you how much of your data has imported.

- After all your data has imported successfully, you should get a final screen letting you know the results of your import:

Summary (step 4 of 4)

Import has completed successfully. The information below summarizes the results.

| Done |

Total Rows	3	Total number of rows in the imported data.
Total Contacts	6	Total number of contact records created or modified during the import.
Import to Groups	Mockaroo Data: 6 contacts added to this existing group.	

| Done |

- From this, you can see that three rows were imported into the CRM. However, as all three were employees of different organisations, there were six contacts created or modified during the import. It also shows that these contacts were added to the existing group.

- Always check that your data has imported successfully:

Bobby Gomez

| Actions » | ✏ Edit | 🗑 Delete Contact |

| Summary | Consumer Feedback | Events 0 | Activities 0 | Cases 0 | Relationships 1 | Groups 1 | Notes 0 | Tags 0 |

Employer	Cummerata-Welch		Tags	
Job Title	Social Worker		Contact Type	Individual
Nickname			CiviCRM ID	2157
Source	Salesforce		External ID	
Home Email	bgomez4@ucl.ac.uk		**Home Phone**	44-(897)558-9166

The contact has imported successfully, with all the expected data, along with the employer as a relationship and in a group.

Importing activities

Preparing your data

Activities are imported in much the same way.First, you need to create your spreadsheet and save as a csv:

first_name	last_name	email	activity type	activity date	activity subject
Bobby	Gomez	bgomez4@ucl.ac.uk	1	31/03/2017	Volunteer Meeting
Gloria	Burton	gburton5@fc2.com	4	31/03/2017	Reminder SMS
Timothy	Kelly	tkelly6@reddit.co.uk	60	31/03/2017	Library Outreach Event

You need to have a contact to save the activity against, it is best to have their email if you have it to prevent the record being put against a contact of the same name. The other fields that are mandatory are the:

- activity type,

- activity date

- activity subject.

Each activity has an ID number, or you can use the name, i.e. meeting, outreach. For this example, we have used the ID rather than the name.

Performing the import

- After going to 'Import Activities', then upload your spreadsheet and select the date format: remember to choose the British date format rather than the American format, as your CRM is configured to recognise British dates.

- There is also the option to load field mapping if you or another user has already created some.

- After clicking on 'Continue', you will then move onto the next screen:

- As with importing contacts, this is where you match the fields to your spreadsheet.

If you don't have all of the necessary information, the CRM will not allow you to proceed. After clicking to continue, you'll see a similar screen as to when you imported the contacts:

Total Rows	3	Total rows (activity records) in uploaded file.
Valid Rows	3	Total rows to be imported.

Column Headers	Import Data (row 2)	Import Data (row 3)	Matching CiviCRM Field
first_name	Bobby	Gloria	First Name (match to contact)
last_name	Gomez	Burton	Last Name (match to contact)
email	bgomez4@ucl.ac.uk	gburton5@fc2.com	Email (match to contact)
activity type	1	4	Activity Type ID
activity date	31/03/2017	31/03/2017	Activity Date
activity subject	Volunteer Meeting	Reminder SMS	Subject

Previous   Import Now   Cancel

- You can then check that all your data is correct, and all your rows are valid.

- If you're happy with it, click 'Import Now':

✔ 1. Upload Data	✔ 2. Match Fields	✔ 3. Preview	» 4. Summary

Summary (step 4 of 4)

Import has completed successfully. The information below summarizes the results.

Done

Total Rows	3	Total rows (activity records) in uploaded file.
Records Imported	3	Rows imported successfully.

- This will give you your summary of the import and let you know whether any rows were not successful. If you check the contact record, you will see the activity has been added.

- You can add multiple activities to any record at any time, with the file up to 2MB. The default status setting is completed, but if you have a variety of different status in your import then you can create a new field and import that.

Try it for yourself

- Create a spreadsheet with an activity connected to one of your contacts. Save as a CSV

- Import the activity. Does it show as you expected?