Importing Accounts and Contacts to PlanMill system

User Guide

Version 1.0

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1. Before importing Accounts and Contacts to the PlanMill system

Importing Accounts and Contacts to the PlanMill system from various sources allow you to save time by eliminating repetitive entries of similar information. All PlanMill users with access rights to Import module (usually **Power User** only) can easily import **Accounts** and **Contacts** information from various sources such as an *Excel sheet*.

With a few easy steps, all contact and account information from other CRM, Project, PSA, or ERP or software systems (*Severa, Sugar CRM, and others*) can be transferred and used immediately.

A list of typical fields that can be imported for example includes *Names, VAT Id, Business Id, Terms of Payment, Invoice operator, Address, Postal code, City, Country*, and so on. A template file in Excel and a complete list of fields, parameters and their description can found in the **PlanMill Online Help**.

1.1 Before importing Accounts and Contacts

The PlanMill administrator activates the Import function for the Power User or other roles. To modify parameters before importing information to the PlanMill system, take note of the following:

- Make sure that the user has relevant rights to the data import function.
- If the default parameters are **OK**, you may start the import process immediately.

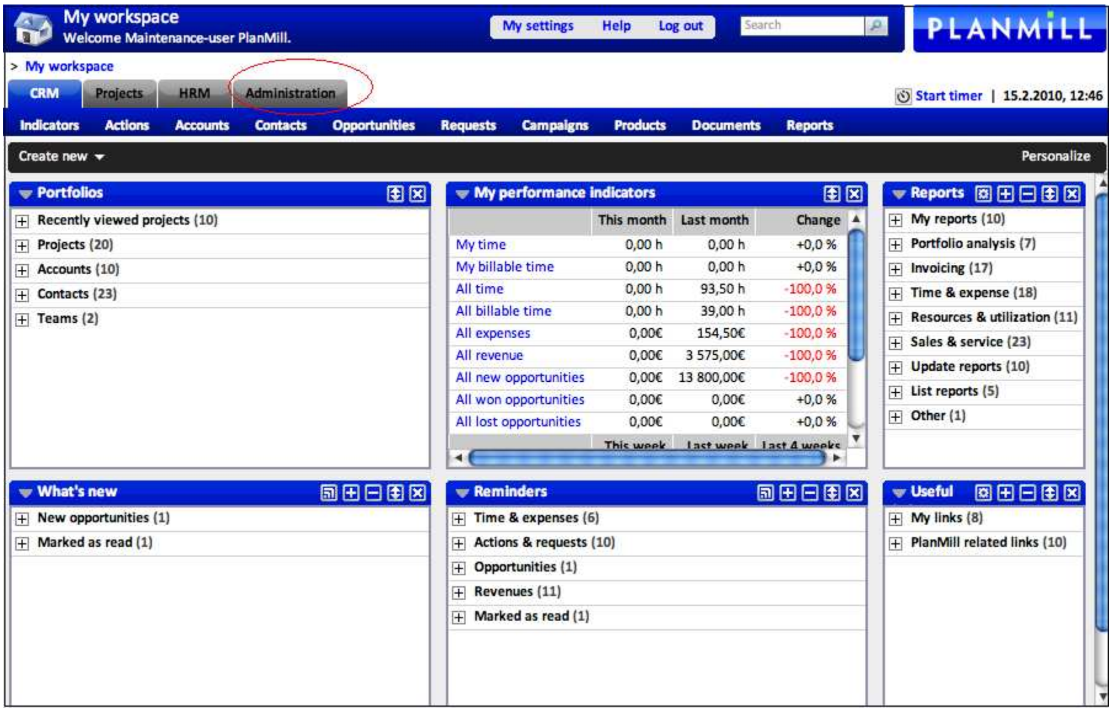


Figure 1. The Import function is under Administration

All fields that do not have information or do not match with list values in the file to be exported are to be filled with default information from the Import values.

1.2 Matching the template of a source document before importing

To ensure successful import, check that your source document such as an *Excel sheet* matches exactly with the template (or copy information from your *Excel sheet* to the template).

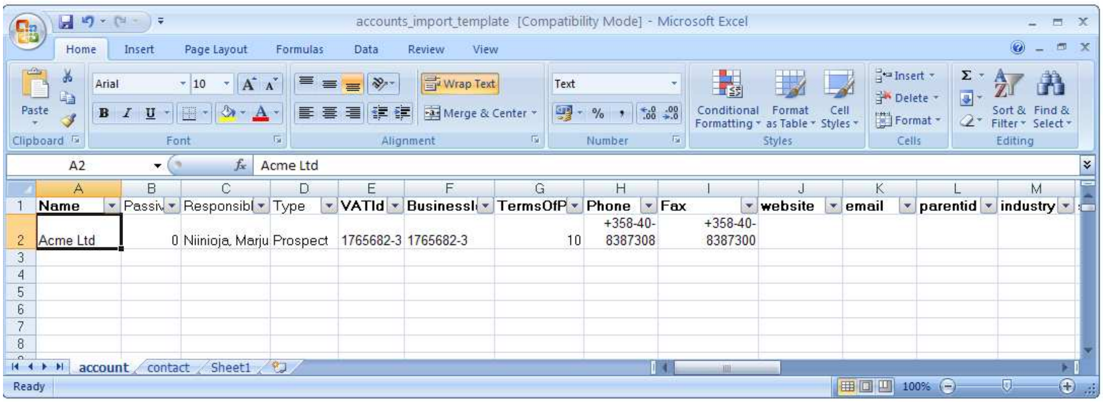


Figure 2. Matching the template of a source document before importing

Select the desired data to import and edit the default values if necessary. The Import section lists all the possible options for data import (in this case just leave heading titles from the source document, such as Excel).

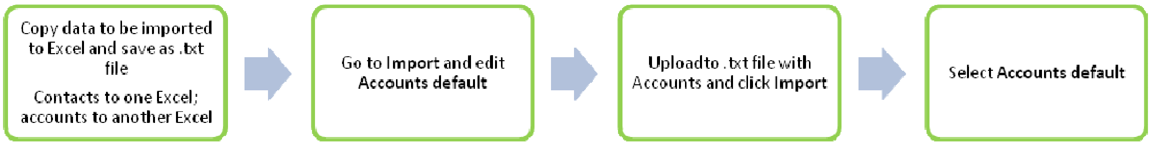
***Note**: If no information for a column is given in the Excel sheet, the import will use the default information from the import edit.*

Select Edit to set the default values for imported data. Also, check that all list values (like countries) and users' names (account responsible) are written exactly in the same way as in **PlanMill's Account** and **Contact** forms. Remove the top row containing the captions for the *Excel* columns, so it will not be included in the import.

Note: When importing contacts it is important to specify what account will be used as a default, if no matching account name can be found. This is defined by editing the Import set-up values.

2. Importing Accounts and Contacts

The picture below shows a summary for Importing Accounts and Contacts to the PlanMill system.



Note: Do the same process for **Contacts default**.

Figure 3. Summary of Importing Accounts and Contacts to the PlanMill system

1. Go to PlanMill **Administration** tab and select **Import**, which will then show a list of imports.

Figure 4. Import tab in Administration showing a list of imports

2. Click **Edit** in front of the **Accounts** default import and set all default information in Import correctly.

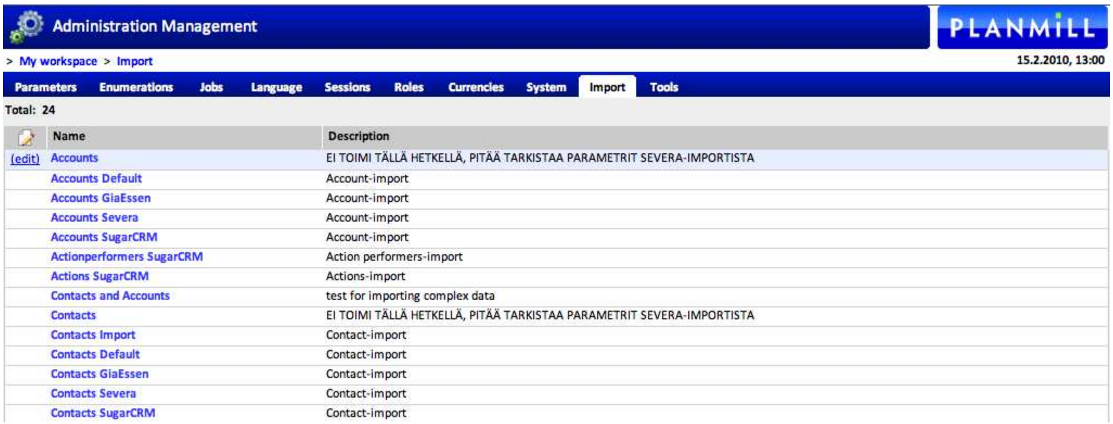


Figure 5 . Editing the Accounts default import

3. In the **Import settings**, enter the value of the desired fields. Under **Default**, select from the listed items in the dropdown menu.

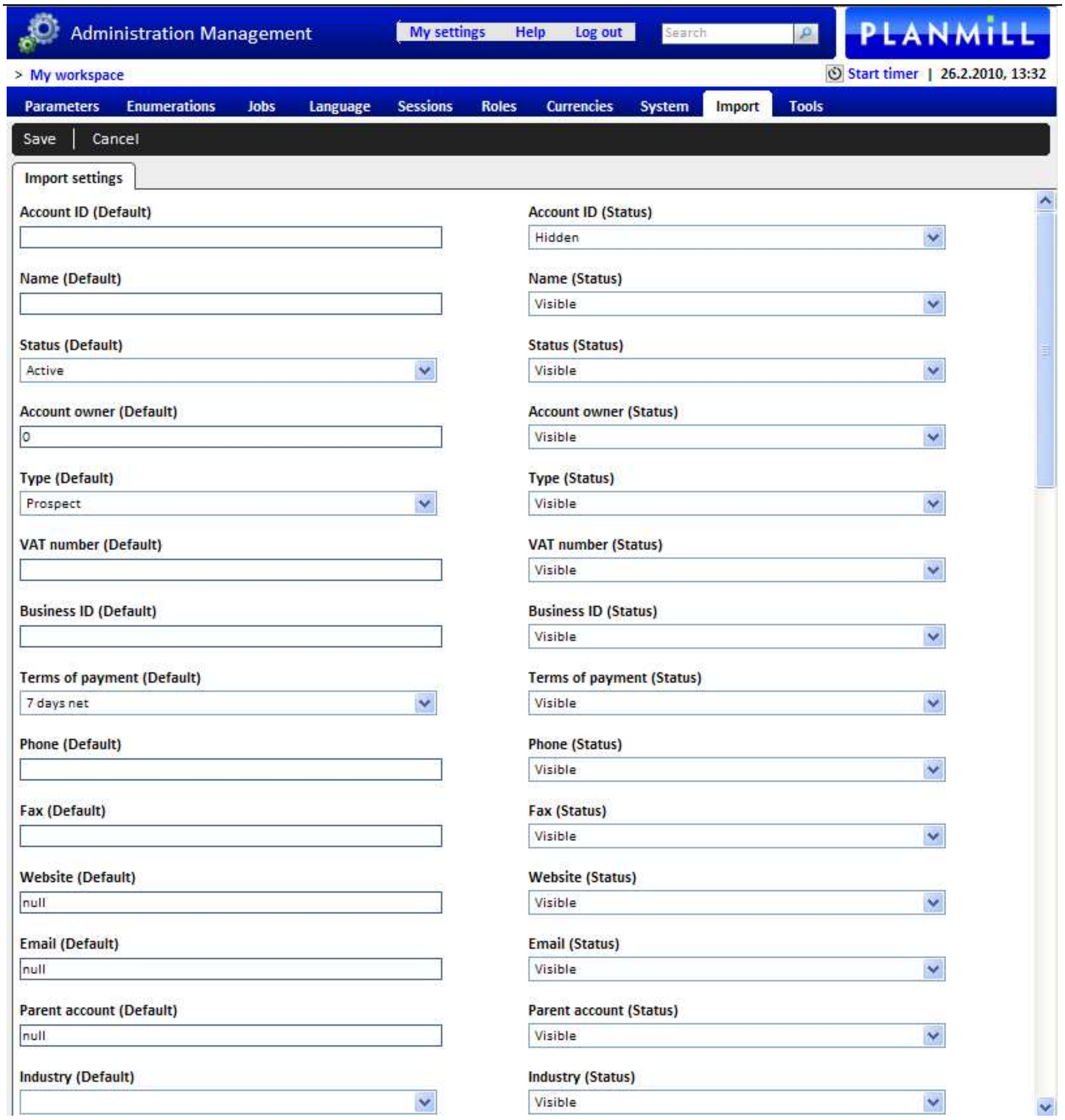


Figure 6. Selecting and entering the value of the default Import settings

Hidden = Value is saved from import parameters and not in the file
Visible = Value is saved from file
Ignored = File contains extra fields that are not imported
Internal id of person 0 = system
Null = means empty value needed for some fields

4. Save the defaults when ready and click on the link **“Account default import”.** Finally, click **“Save”.**

5. When the parameters are correctly set, you can now start to import **Accounts** and **Contacts** from another system or from other source documents to the PlanMill system. Select **Import** Data and save the imported text file, which will then be stored in a database. The imported file must have specific fields and separators, as defined in the original definition of the data to import. Save the *Excel* as tab-delimited txt –file (***Save as***…). Save accounts to one file and contacts to another.

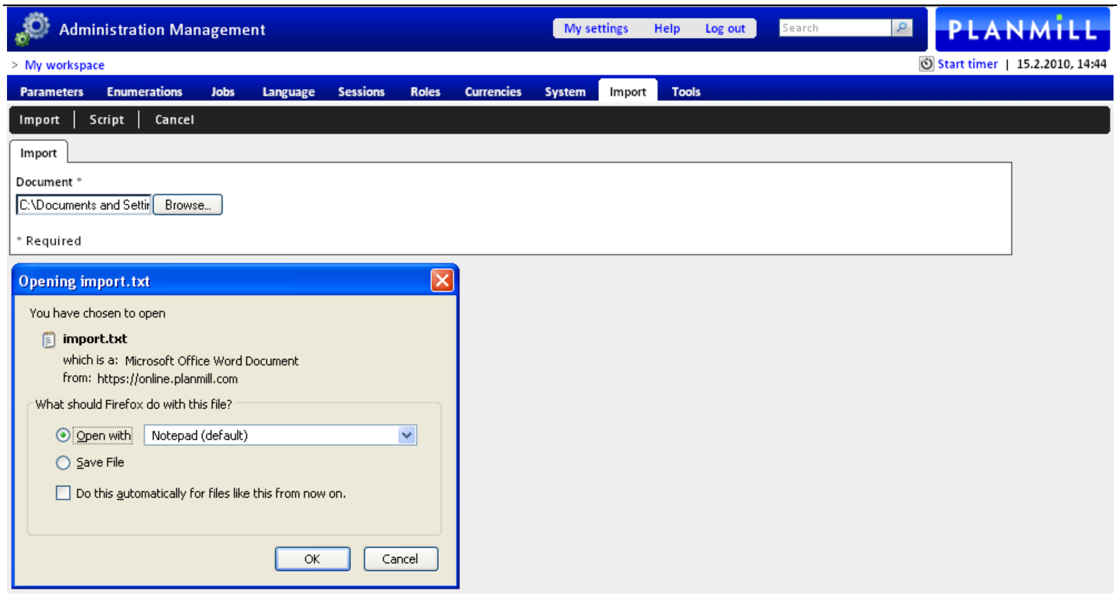


Figure 7. Selecting the text file containing the accounts for importing to PlanMill system

7. In the file upload, click on the **Browse** button and select the text file containing the accounts. Click **Import** and PlanMill will start reading the account data from the file row by row. **Error** messages will appear if there is too long information or if something else goes wrong.

Note: *The Script is for debugging only. Save file from Script tool and send to PlanMill administrator.*

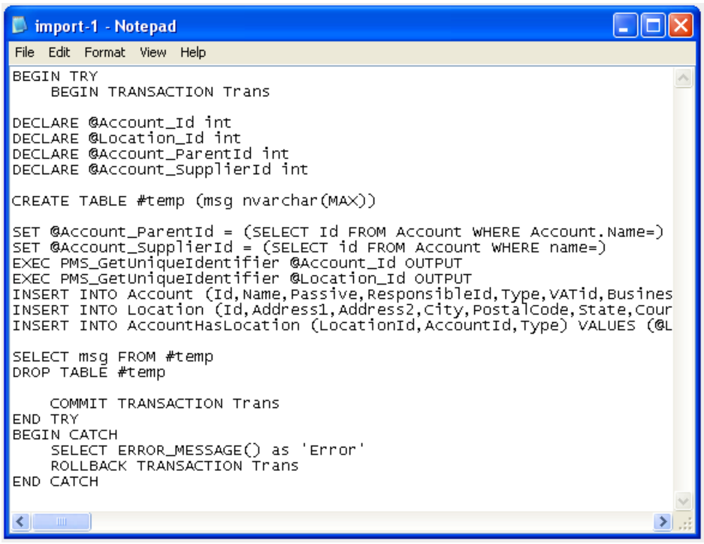


Figure 8. Debugging script to be sent to PlanMill administrator.

An **OK** message appears if all actions were made correctly. If there were any errors, nothing will be read in **PlanMill** and you will need to do the import process again after you have fixed the data.

Do the **Contact** import by repeating steps 5-8, but use the ***"Contact default import".*** It is very important to import first any new accounts before importing contacts to those accounts.

8. Store the imported information in the database.

Note: *If an error message is shown, incorrect data rows are displayed as they were in the original text file, in addition to showing the line number. This happens for example if in the imported file, the value exceeds the allowable length of the database – it will then show the text that says what is assumed and the permissible length of the field.*

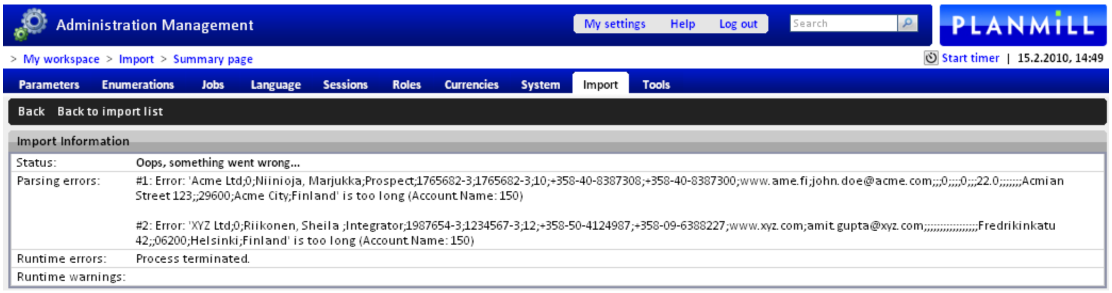


Figure 9. An error message showing a text that is too long.

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Glossary

Accounts	Each contact belongs to an account. All the users are also shown on the contacts tab. Contacts can be linked to actions, requests, campaigns, and so on. Accounts are typically companies that are potential customers (prospects) or existing customers.
Contacts	Store information about your partners, affiliates, suppliers, and other relevant details. Enjoy quick access to all critical account data, including a company overview, key sales data, relevant documents, partners involved in the account, and more.
Import specification	Description and details of **Accounts, Contacts, Actions** and **Opportunities** parameters.
Power User	Refers to person(s) with corresponding access rights as a power user, and can for example view all absences and accept interruptions in absence request. Power User also refers to the system roles of a person with corresponding access rights to the PlanMill system as a whole.
Project	Refers to specific tasks assigned to one or more performers as an assignment. A request has to be related to a project. Project requests are also related to contacts /partners. Time can be reported for each project and can be entered by the performer(s) after each request. A competence is bound to a billable request is based on a project's price list. Each project contains different price types.
Request	A request is a wish or requirement attached to a certain project as a task and optionally to one or more performers. For each performer, an assignment is created. A request can be related to contacts, projects requests and partners. Time can be reported for the requests by the performers.
Task	A task is attached to a certain project assigned to one or more performers.
Users	Persons or employees in the company listed in the HR database, which for example, can perform general actions within the PlanMill system.
Work Schedules	Used commonly by the **Resource** & **Project Manager** for tracking tasks, requests and their deadlines and shows assignments and performers assigned to the tasks. In PlanMill Time Reporting, this is useful for checking current resources for the company during multiple projects.
Workspace	Also called **My Workspace,** this is the PlanMill dashboard where users can customize screen layouts from different readymade options and can add frames, gadgets, and widgets.