

IMPORTING INTO POWERBASE



Import Contacts

»1. Choose Data Source

2. Match Fields

3. Preview

4. Summary

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 Outlook®, Lotus Notes®, or Excel®, and you want to start using CiviCRM to store these contacts, you can 'import' them here.

[View](#) [Edit](#) [Delete](#)

[Continue >>](#) [Cancel](#)

Choose Data Source

Data Source *

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: 8 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 Organization Subtype

For Duplicate Contacts Skip Update Fill No Duplicate Checking

Dedupe Rule

Import Field Separator

Date Format yyyy-mm-dd OR yyymmdd (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)

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Match Fields (step 2 of 4)

Review the values shown below from the first 2 rows of your import file and select the matching CiviCRM database fields from the drop-down lists in the right-hand column. Select '- do not import -' for any columns in the import file that you want ignored.

If you think you may be importing additional data from the same data source, check 'Save this field mapping' at the bottom of the page before continuing. The saved mapping can then be easily reused the next time data is imported.

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Cancel

Saved Field Mapping: Voter Import

Column Names	Import Data (row 1)	Import Data (row 2)	Matching CiviCRM Field
Civcrm ID	638	528	Internal Contact ID *
SOS_VOTERID	OH0018469571	OH0018463674	State Voter File ID :: Voter Info
COUNTY_NUMBER	50	50	- do not import -
COUNTY_ID	468	885	Internal Contact ID *
constituent type	Member	Member	- do not import -
LAST_NAME	RIEBE	PITTS	Last Name *
FIRST_NAME	MICHAEL	JOANN	First Name *
Middle Name	K	L	Middle Name

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Preview (step 3 of 4)

The information below previews the results of importing your data in CiviCRM. Review the totals to ensure that they represent your expected results. Click 'Import Now' if you are ready to proceed.

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Import Now >>

Cancel

Total Rows	2009	Total number of rows in the imported data.
Valid Rows	2009	Total rows to be imported.

Saved Field Mapping: Voter Import

Column Names	Import Data (row 1)	Import Data (row 2)	Matching CiviCRM Field
Civcrm ID	638	528	Internal Contact ID
SOS_VOTERID	OH0018469571	OH0018463674	State Voter File ID :: Voter Info
COUNTY_NUMBER	50	50	County Name :: Voter Info
COUNTY_ID	468	885	CountyFileID :: Voter Info
constituent type	Member	Member	- do not import -
LAST_NAME	RIEBE	PITTS	Last Name
FIRST_NAME	MICHAEL	JOANN	First Name
Middle Name	K	J	Middle Name
SUFFIX			Individual Suffix
YEAR_OF_BIRTH	1943	1943	- do not import -

Date of data

3/1/2010

3/1/2010

Date of Voter Data :: Voter Info

▶ Add imported records to a new group

▼ Add imported records to existing group(s)

44504 Members interested in Immigrant Rights
44505 immigrant rights interest
Administrators
Advanced Search IG - TEST
Collecting Emails

▼ Create a new tag and assign it to imported records

Data Imported July 2012

Tag

Description

▶ Tag imported records

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Import Now >>

Cancel

2011	PN,GY	PN,GN	Elections 2011 :: Voter Info
2012	PY,GY	PN,GY	Elections 2012 :: Voter Info
2013	PN,GY	PN,GY	- do not import -
Party	P		- do not import -
Date of data			Date of Voter Data :: Voter Info

Importing records...

4% Completed

100 of 2009 records - 8 minutes 16 seconds remaining

44504 Members interested in Immigrant Rights
44505 immigrant rights interest
Administrators
Advanced Search IG - TEST
Collecting Emails

▼ Create a new tag and assign it to imported records

Data Imported July 2012

Tag

TIPS

- To speed up import, make the data set simpler
- Try to import no more than 20k entries at a time, if you are using the standard import
- Check with Support@progressivetech.org if you need to work with large or complex data sets.

