

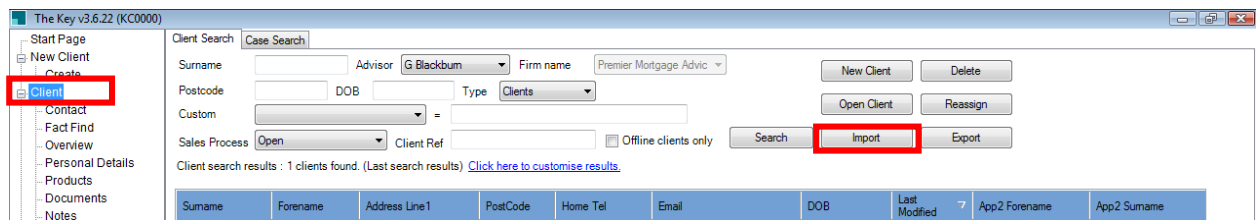
## Importing of Clients, Contacts & Leads



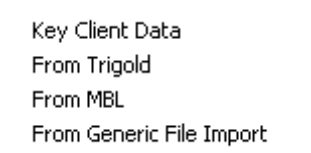
The **Import** function can be found within the **Client** module of the Key. It enables client data previously input into Trigold, Mortgage Brain “MBL” or from other formatted systems to be imported as client or lead details into the Key.

It should be noted that the import function will only transfer basic client data from the source system into the Key and should not be viewed as a full data transfer. The actual level of data imported will depend on the amount of data previously held within the source system.

In order to import client and lead details go to the **Client** area and click on the **Import** button.



This will list the possible import sources.

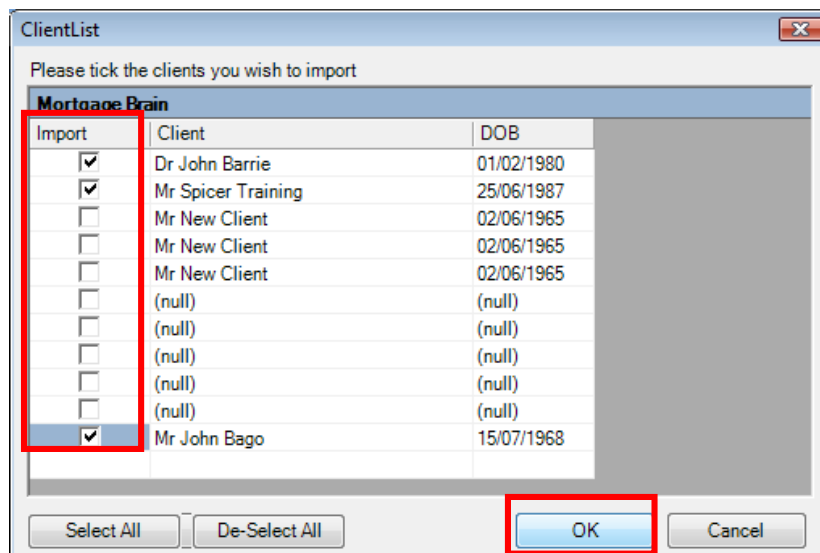


This guide is split into the following sections:

- Import from Trigold and MBL
- Import from Generic File Import
- Creating a New Import Specification
- Using and Existing Import Specification

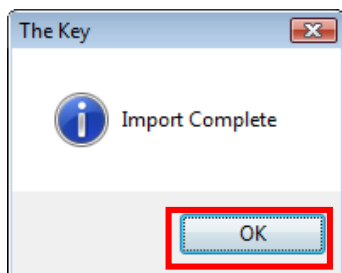
### Import from Trigold and MBL

Click on the relevant source (in this case we will select MBL) and a list of clients held in the source system will be displayed. Select the required client(s) by ticking the relevant boxes and **OK**.

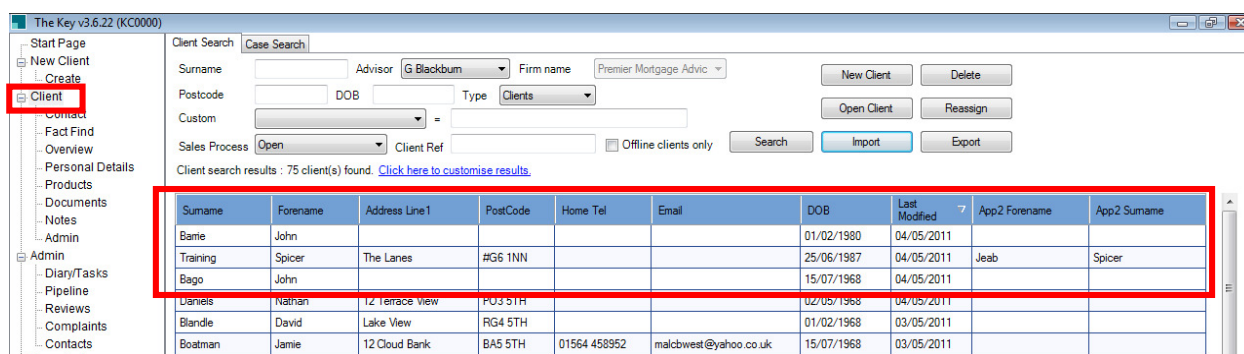


The **Select All** button allows all clients held in the sourcing system to be imported into the Key in one go. **NB: Care should be taken when choosing the Select ALL option as this could import a large number of clients which in turn may not necessarily contain up-to-date information.**

A message will be displayed when the import is complete as shown below. Click **OK** to proceed.



The clients that have been imported will now appear in the list of clients held within the Key.



## Import from Generic File Import

The Generic File Import option allows **Lead**, **Client** and **Contact** details to be imported from a number of different sources into the Key. The possible source file options are:

- .csv
- .txt
- Excel
- Access
- Sql
- Xml

This guide will cover an import from an Excel spreadsheet. Where an import is required from another source and additional guidance is required please contact the **Key Helpdesk on 0871 384 0194**.

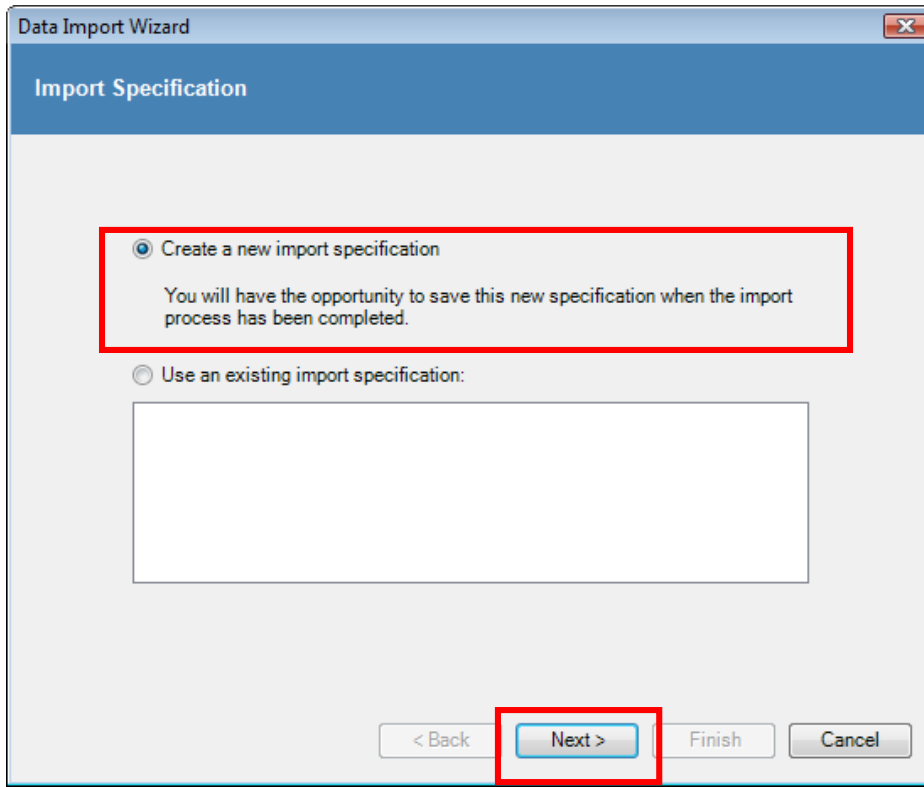
**NB: Prior to undertaking any import it is essential to ensure that the source data is accurate to avoid any corrupt details being imported into the Key. Where any blank columns or rows are found these should be corrected as appropriate prior to the import being undertaken.**

There are two options available:

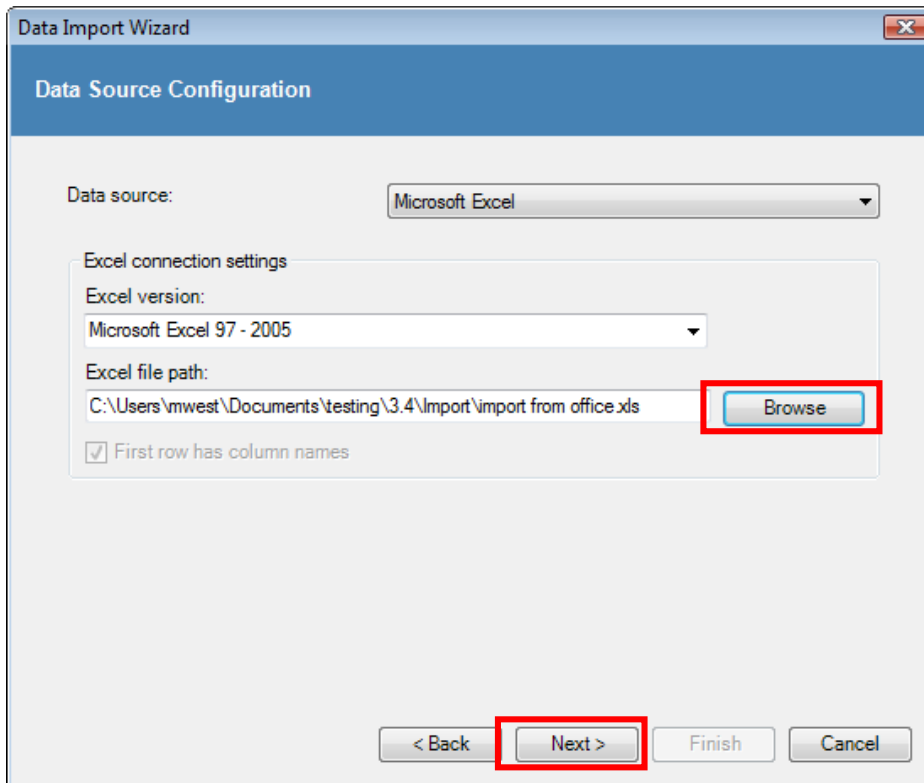
- Create a new Import Specification
- Use an existing import specification

## Creating a New Import Specification

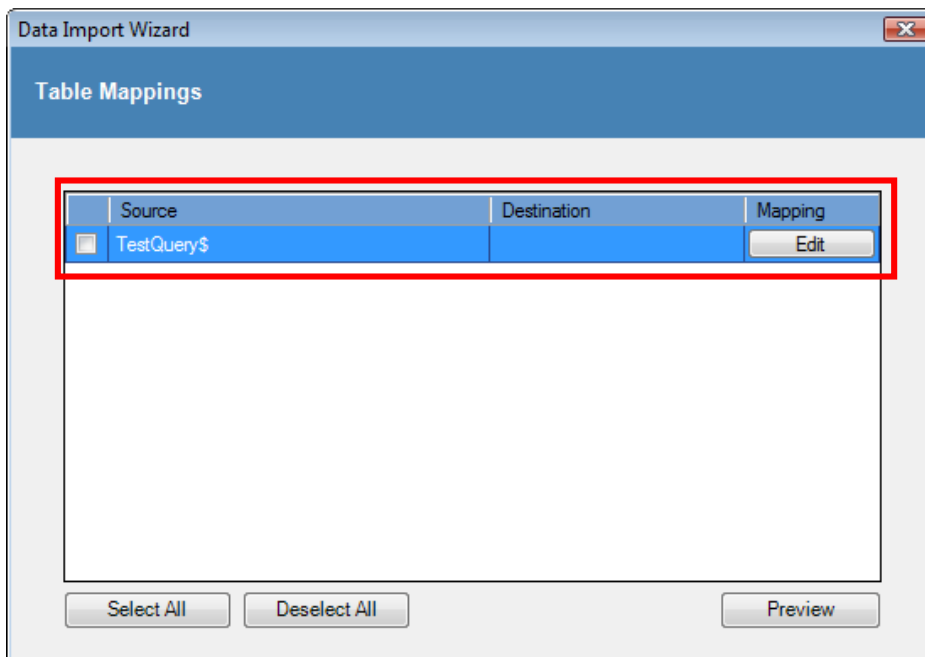
Click on the **From Generic File Import** option. Select **Create a new import specification** and click **Next**.



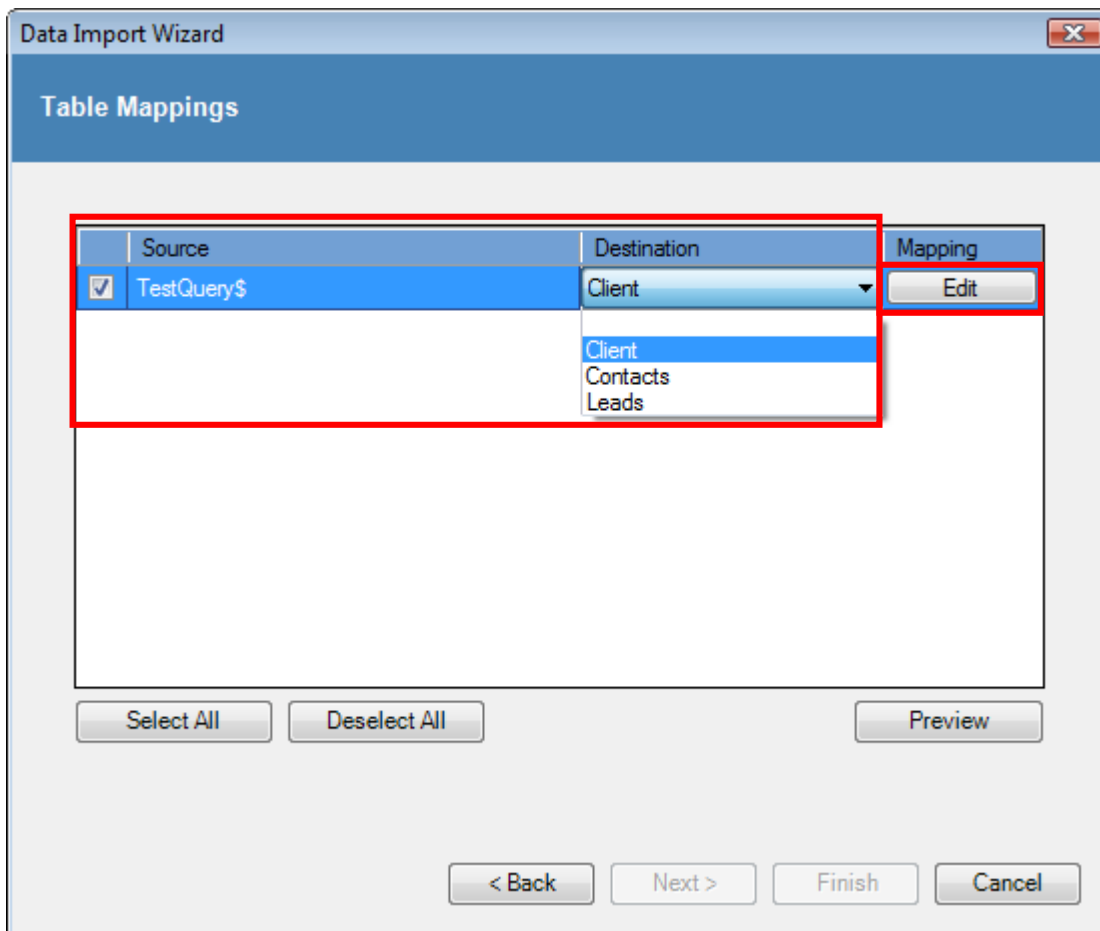
This will display a **Data Source Configuration** screen. In this case we will select a **Microsoft Excel** spreadsheet. The specific file can be located by clicking on the **Browse** button. Click **Next**



A Table Mappings screen will now be displayed. The **Source** column will list any worksheets that are contained within the source spreadsheet.



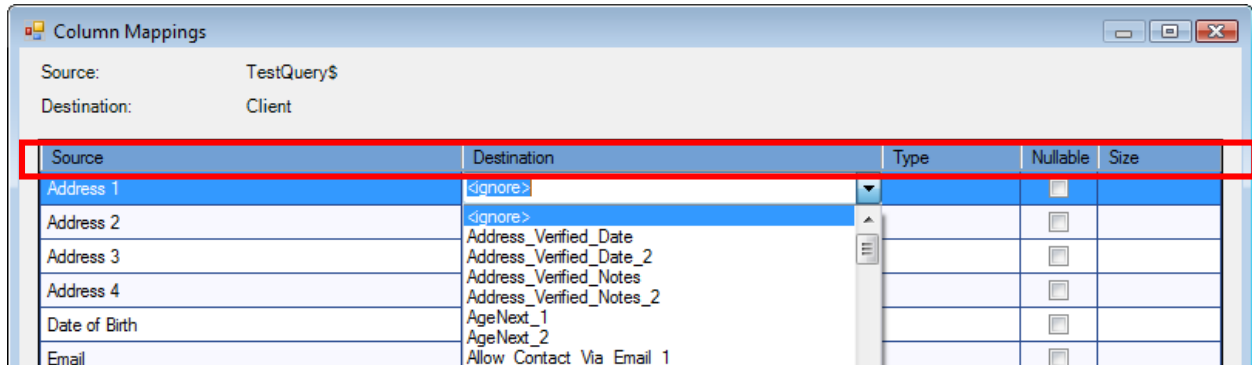
Place a tick against the required worksheet name and the **Destination** options of Client, Contacts or Leads will be available. Select **Client**, **Contacts** or **Leads** as required and then click on **Edit** to link relevant fields between the source file and the Key.



A **Column Mappings** screen will be displayed.

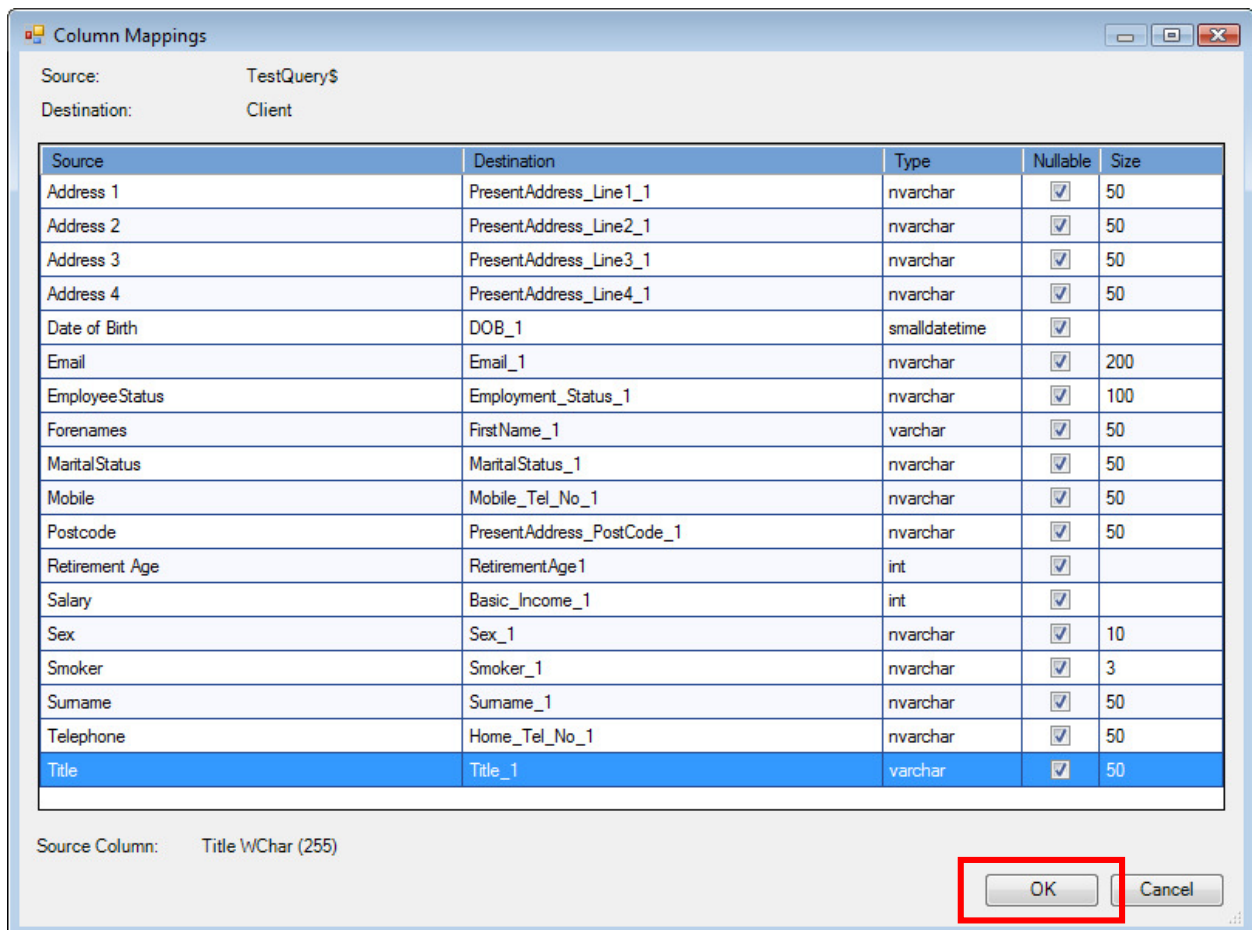
- The **Source** column shows the field name contained in the source spreadsheet
- The **Destination** column shows the available fields within the Key
- The three remaining columns of **Type**, **Nullable** and **Size** will be automatically completed by the Key when a destination is selected

To select a field within the Key click on the dropdown arrow within the **Destination** column of the row required. A list of available fields within the Key will be displayed.



**NB:** to view a list of available fields in the Key please refer to the Merge Fields Fact Find template within the Client > Documents > Template area of the Key. This document can be opened and saved and lists all client data fields held within the Key. A copy of this template can also be found on the Sesame Key website at [http://www.thekey.uk.com/sesame\\_thekey.aspx](http://www.thekey.uk.com/sesame_thekey.aspx)

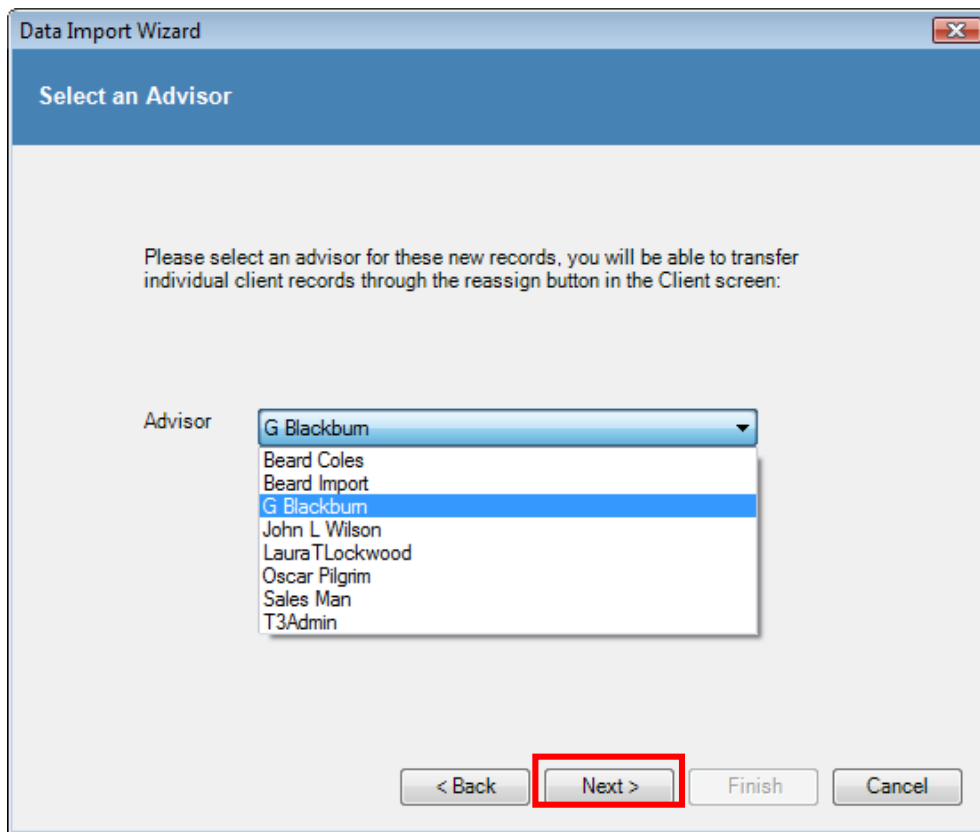
A completed list is shown below.



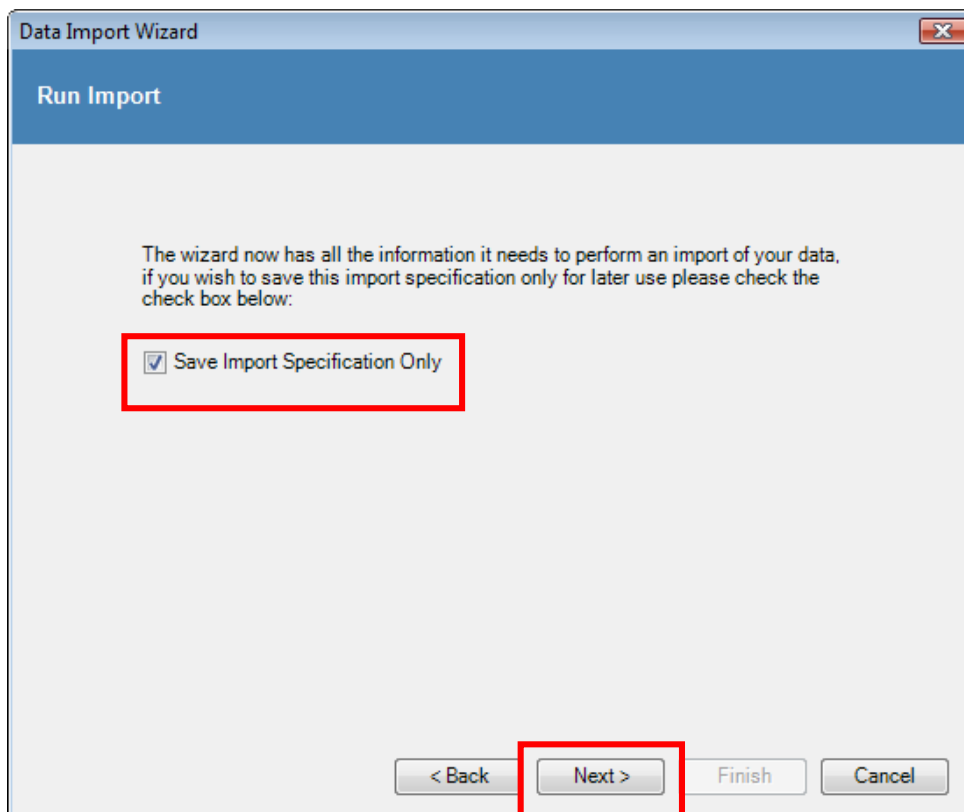
When finished click **OK**. This will return you to the **Table Mappings** screen.



Select the required adviser and click **Next**.



The **Run Import** screen can be used to save the Import Specification for later use. In order to save place a tick in the box and click **Next**. In order to run the import immediately leave the box unticked and click **Next** (the import specification can be saved later in the process).



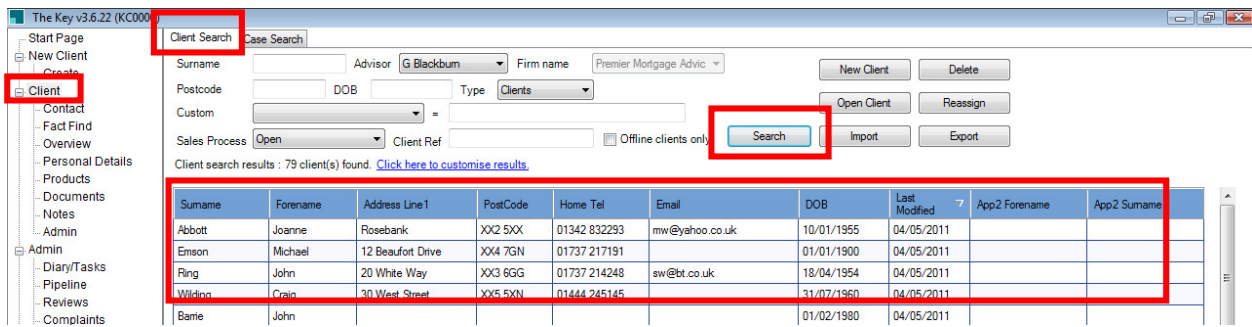
If the import specification is to be saved enter a **Description** and click **Finish**. In order to run the import at a later time follow the **Use an Existing Import Specification** procedure below.

The screenshot shows a window titled "Data Import Wizard" with a sub-header "Save Import Specification". The main text reads: "The import specification is now ready to save, simply enter a description and click Finish." Below this is a text input field labeled "Description:" containing the text "Import from office". At the bottom, there are four buttons: "< Back", "Next >", "Finish", and "Cancel". The "Finish" button is highlighted with a red rectangular box.

If the import specification has not been saved the following screen will be displayed confirming that the import has completed and the number of records imported. The import specification can be saved at this stage by entering a **Description**. Click **Finish** to complete the import.

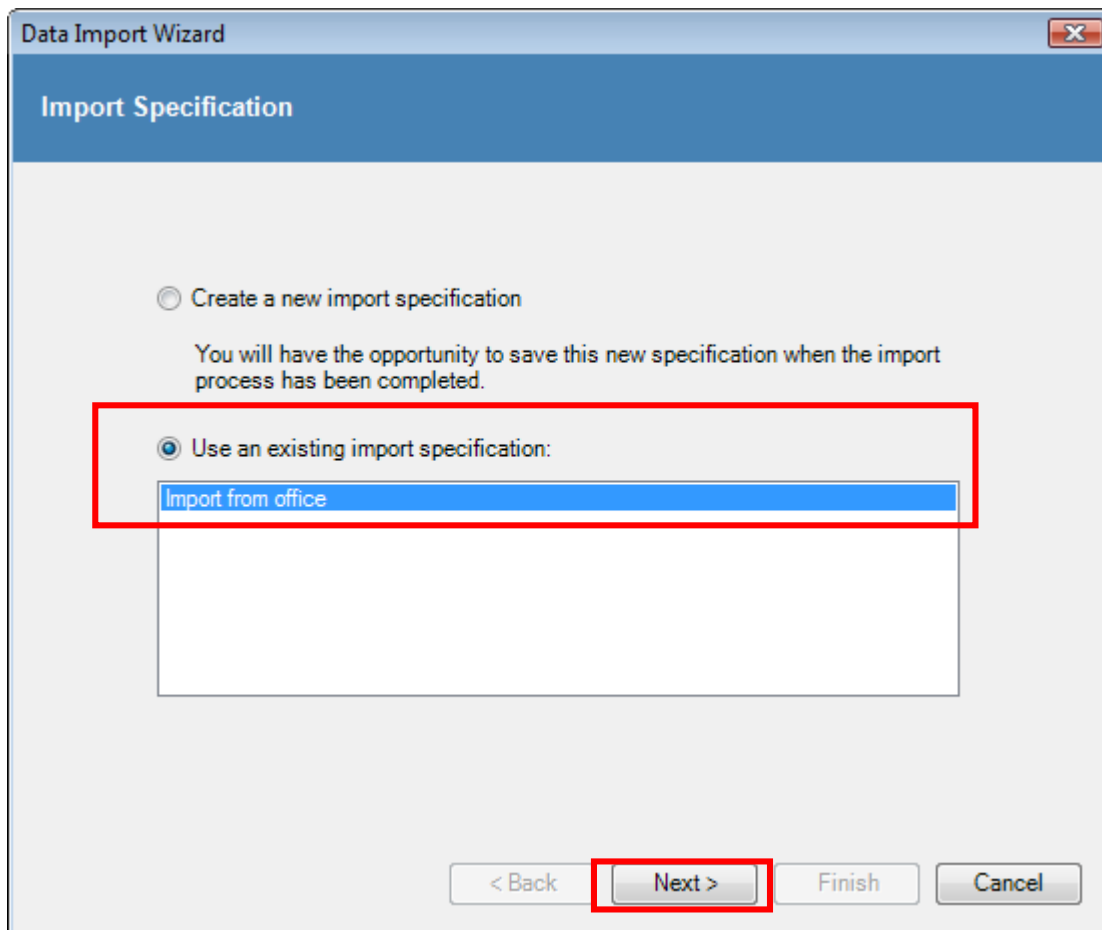
The screenshot shows a window titled "Data Import Wizard" with a sub-header "Save Import Specification". The main text reads: "4 records have been successfully imported into The Key, if you wish to save this import specification for later use simply enter a description and click Finish." Below this is a text input field labeled "Description:" containing the text "Import from office". At the bottom, there are four buttons: "< Back", "Next >", "Finish", and "Cancel". The "Finish" button is highlighted with a red rectangular box.

The clients that have been imported will now be available to view in the **Client > Client Search** screen. To refresh the client screen click **Search**.

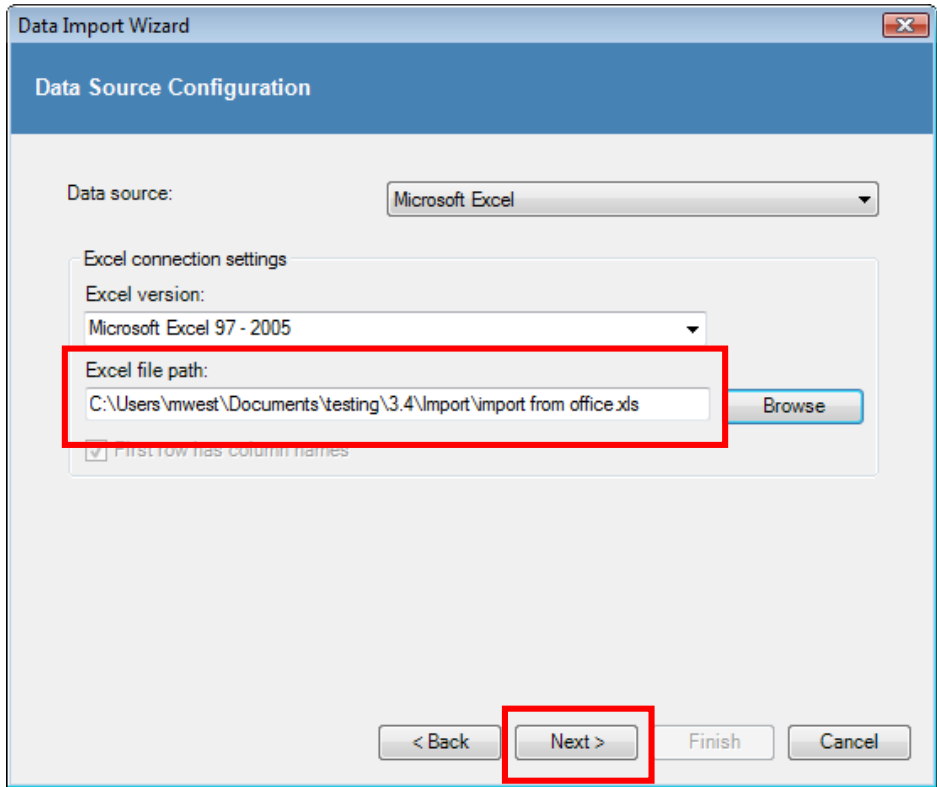


## Using an Existing Import Specification

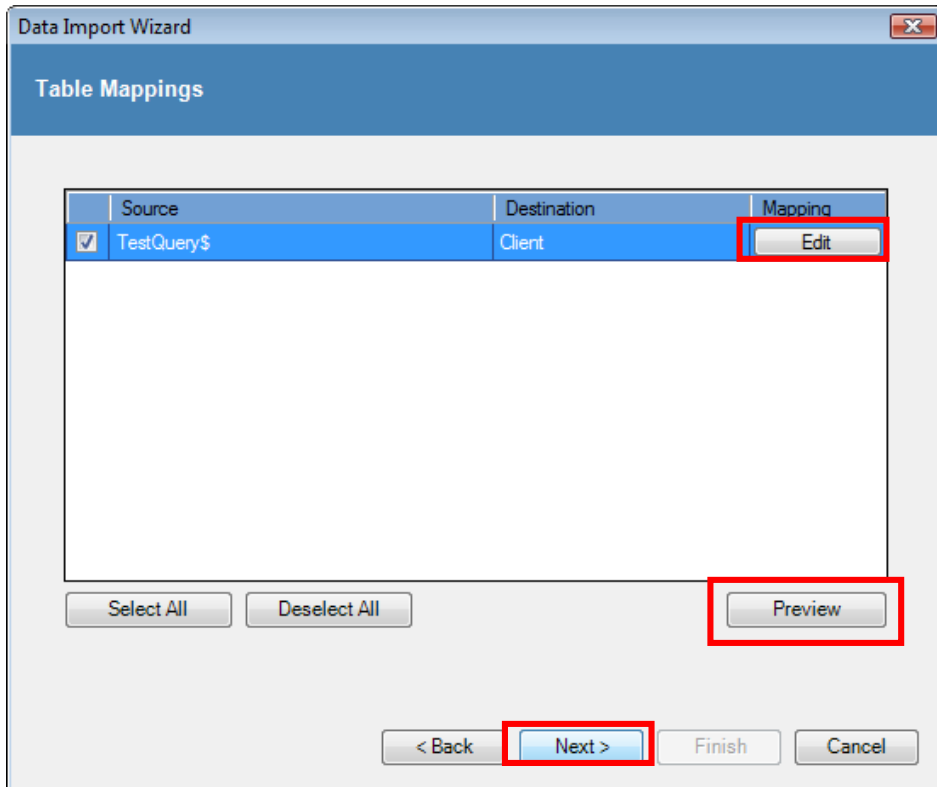
Click on the **From Generic File Import** option. Select **Use an existing import specification**, highlight the required description and click **Next**.



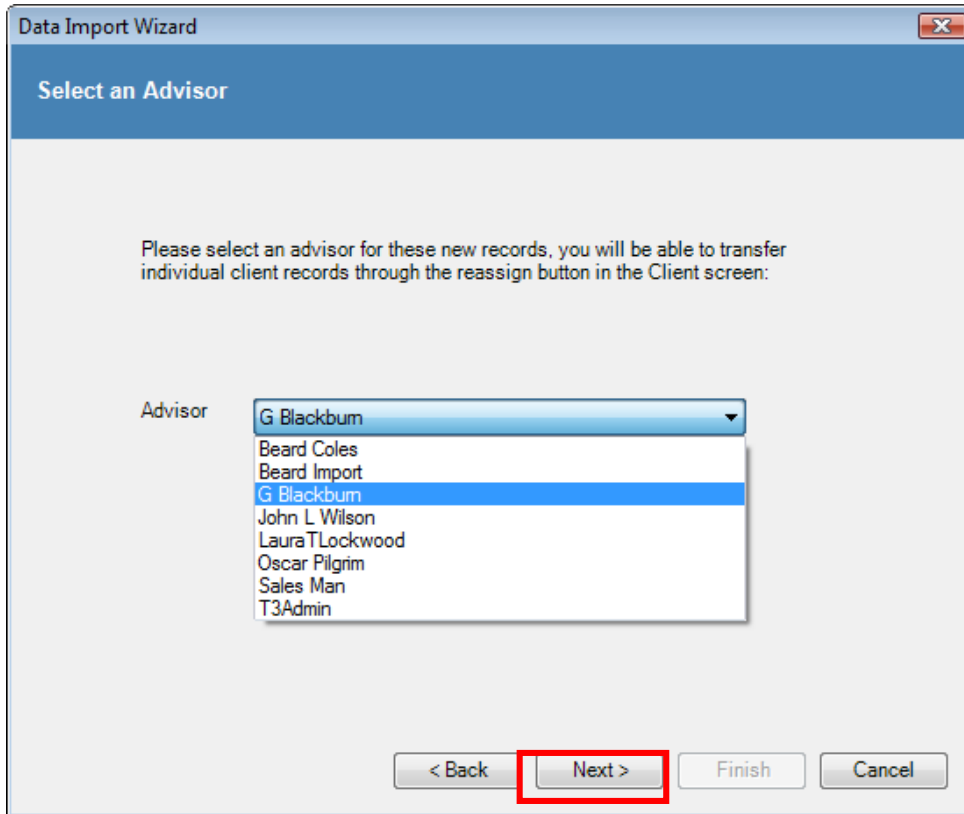
The **Data Source Configuration** box will be displayed which will detail the source file used within the original import process. **NB: the original source file must be used. In the event that new data is required to be import into the Key this should be added to the original source file and any historic data deleted prior to the import process being started.** Click **Next**.



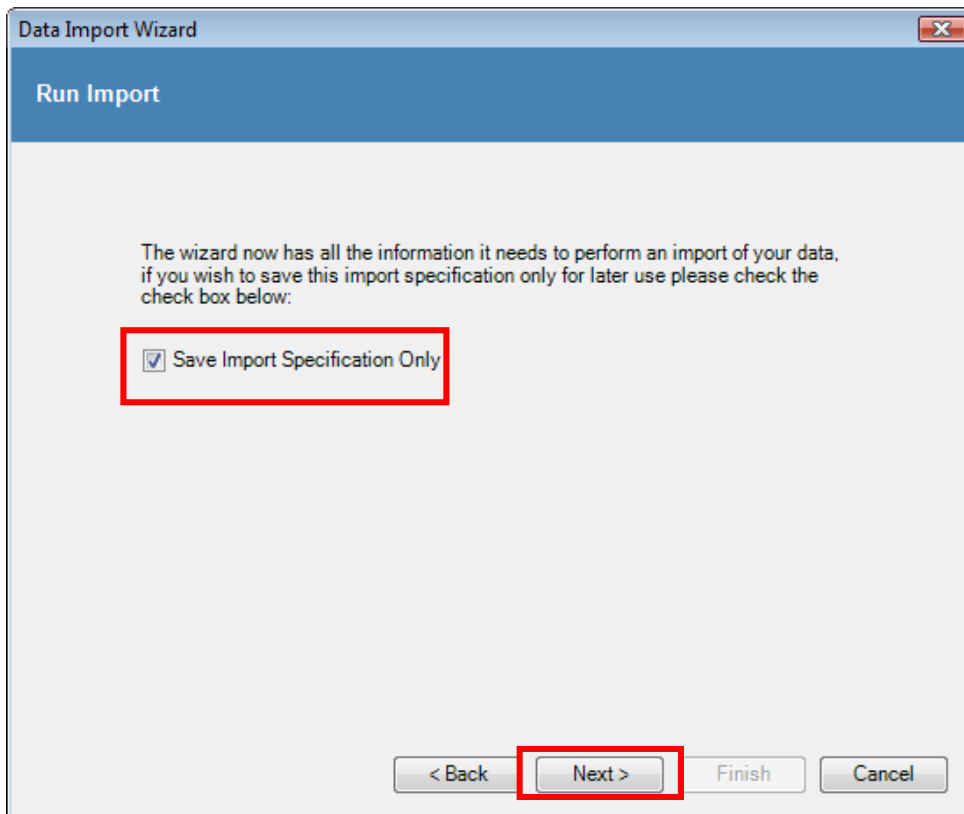
The **Table Mappings** screen will be displayed. Click **Edit** to review the mappings originally created and **Preview** to view a sample of the fields which have been successfully mapped. Click **Next**.



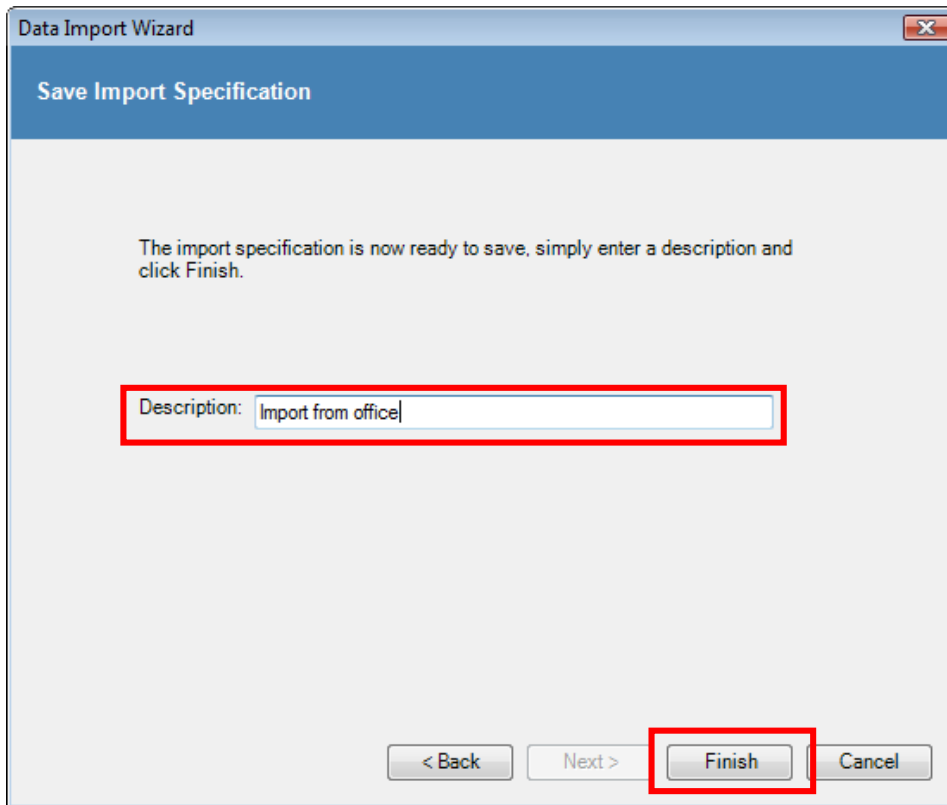
Select the required adviser and click **Next**.



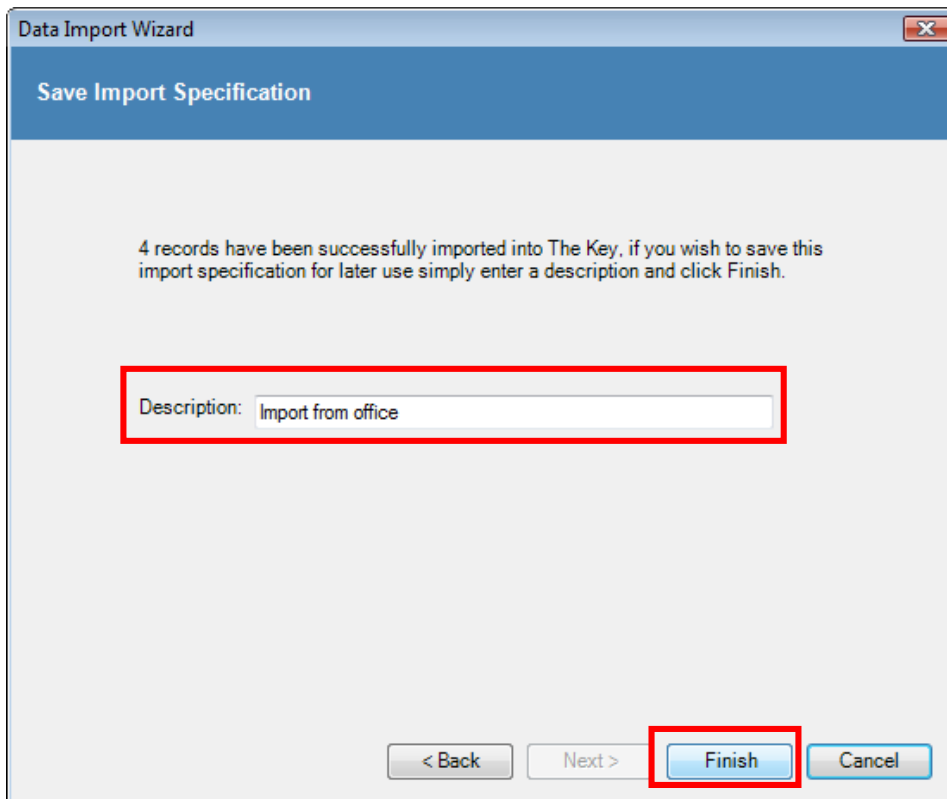
Where any changes have been made to the original import specification the **Run Import** screen can be used to save the Import Specification. In order to save, place a tick in the box and click **Next**. In order to run the import immediately leave the box unticked and click **Next** (the import specification can be saved later in the process).



If the import specification is to be saved enter a **Description** and click **Finish** and rerun the import using the above procedures.



If the import specification has not been saved the following screen will be displayed confirming that the import has completed and the number of records imported. If any changes have been made to the original import specification they can be saved at this stage by entering a **Description**. Click **Finish** to complete the import.



The clients that have been imported will now be available to view in the **Client > Client Search** screen. To refresh the client screen click **Search**.

The screenshot shows the 'Client Search' screen in 'The Key v3.6.22 (KC000)'. The interface includes a sidebar on the left with 'Client' highlighted. The main area contains search filters and a table of results. A red box highlights the 'Client' menu item, the search filters, the 'Search' button, and the search results table.

Client search results : 79 client(s) found. [Click here to customise results.](#)

Surname	Forename	Address Line1	PostCode	Home Tel	Email	DOB	Last Modified	App2 Forename	App2 Surname
Abbott	Joanne	Rosebank	XX2 5XX	01342 832293	mw@yahoo.co.uk	10/01/1955	04/05/2011		
Emson	Michael	12 Beaufort Drive	XX4 7GN	01737 217191		01/01/1900	04/05/2011		
Ring	John	20 White Way	XX3 6GG	01737 214248	sw@bt.co.uk	18/04/1954	04/05/2011		
Wilding	Craig	30 West Street	XX5 5XN	01444 245145		31/07/1960	04/05/2011		
Barrie	John					01/02/1980	04/05/2011		