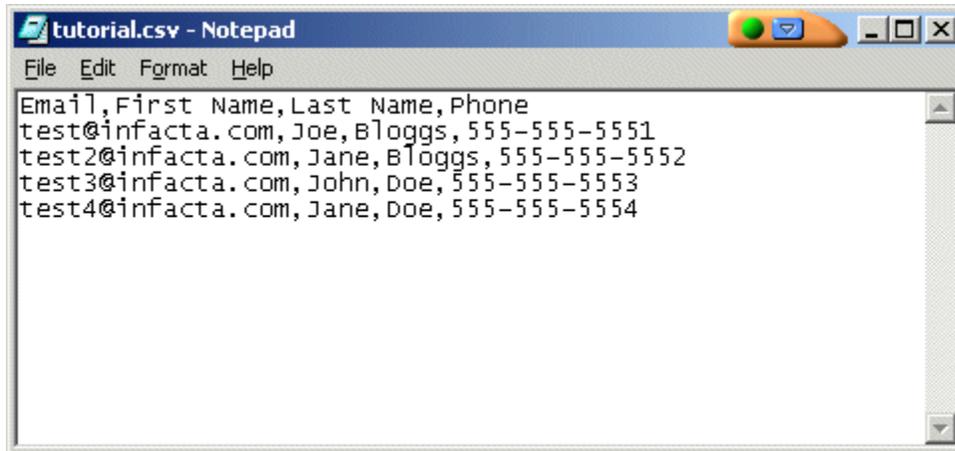


File Importing - Text Files

With this tutorial we are going to go through the basic elements of importing a text file that contains several records (lines) each containing several fields.

Sample Data - a typical Text File

Here is a sample of such a text file, opened in Notepad (the default Windows Text editor).



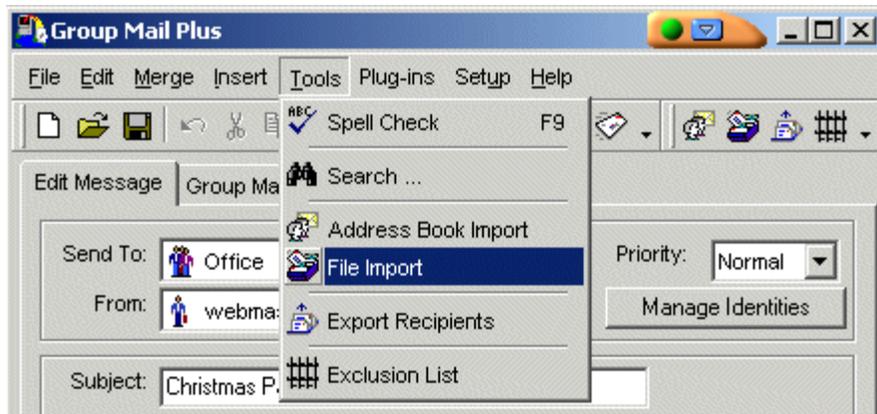
```
tutorial.csv - Notepad
File Edit Format Help
Email,First Name,Last Name,Phone
test@infacta.com,Joe,Bloggs,555-555-5551
test2@infacta.com,Jane,Bloggs,555-555-5552
test3@infacta.com,John,Doe,555-555-5553
test4@infacta.com,Jane,Doe,555-555-5554
```

As you can see each record (line) contains several pieces of text with a comma appearing between them. This comma is known as the delimiter. A common name for a text file with records and fields delimited by commas is CSV (comma separated values). Each record (line) contains the same number of fields (this is important for consistent results). The first line of text contains the field names, this helps when importing later - however this information is not required and overall it will be ignored.

This text file was actually created by saving a spread sheet from Excel as CSV (Save As in Excel). Most applications that store data allow you to export or save data in this format.

Step One - Getting started

To start importing a file you will need to go to the tools menu in Group Mail, then click on the Import option. Please note that you can also do this from the Group Manager tab.



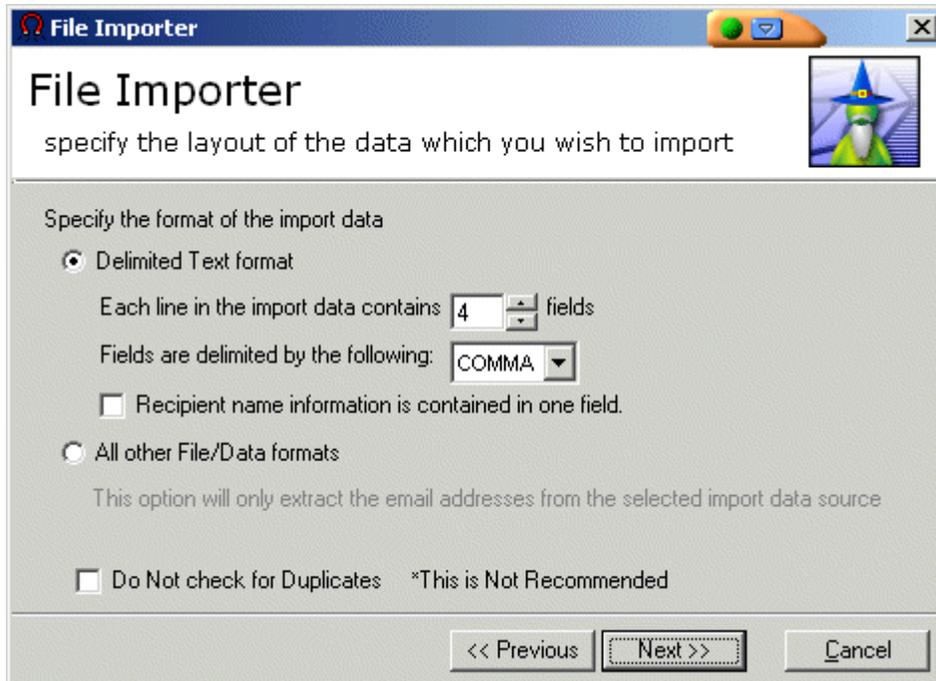
Once you have clicked on the tool menu the File Import wizard will start.



For this tutorial you are going to be importing a file. Select the 'Import recipient data from a file' option. Then click on the Select Button. You will be presented with a standard File Open dialog which you should use to locate the file you want to import. Once you have selected the file and closed the File Select dialog (by clicking on the Open button) you should click the button marked Next (see above) to proceed.

Step Two - File layout

Now you get to tell the importer how the file is setup.



The Importer will attempt to determine how the file is made up. It does this by looking for a common delimiter and then it will count the number of fields. You should double check what it defaults to make sure it is correct. Alternatively you can ignore what it suggests and set each option as you like. The type of file we selected which is a comma delimited file so you should make sure that the Delimited Text format option is enabled. We know that each line contains 4 fields and that the delimiter is COMMA. We also know that the name information (First Name and Last Name) are in different fields so we make sure that the option which says 'Recipient name information is contained in one field' is clear/unchecked. You would only use this if the First and Last names appeared in just one field. Our sample has them appearing in two separate fields.

NOTE: If you only want to extract the email addresses from the file you are importing then you can choose the All other File/Data formats option. This is the best option to use when importing simple lists that contain just email addresses. You can also use this option to extract email addresses from any type of file (not just text files).

It is recommended that you let the Importer check for duplicates (make sure the 'Do Not Check for Duplicates' option is clear/unchecked). This will make the import process slower - but it will make sure that you do not import any duplicate records.

You are now ready to proceed. Click Next.

Step Three - Field Mapping

We know that the file we are importing contains four fields, Email, First Name, Last Name and Phone. In order to get this information into Group Mail in a useable way we need to tell the Importer which field belongs where.



For the first field, Email we click on the Drop down list beside Email Address (above) and choose Input Field 1 (as you can see above the information stored in Field one on line one in our import file is being shown - this is for guidance purposes). Next field is First Name - click the Drop down next to that and choose Input Field 2, repeat this for Last Name (Input field 3) and Phone (Input Field 4). (use the large scroll bar to move down through the list of visible fields).

If you are going to be importing this type of file with this layout regularly you should now choose to Save the Layout (click Save Layout button). The next time you are importing the same type of data (with the exact same layout) you just need to open the Layout file (use the Open previously saved Layout button).

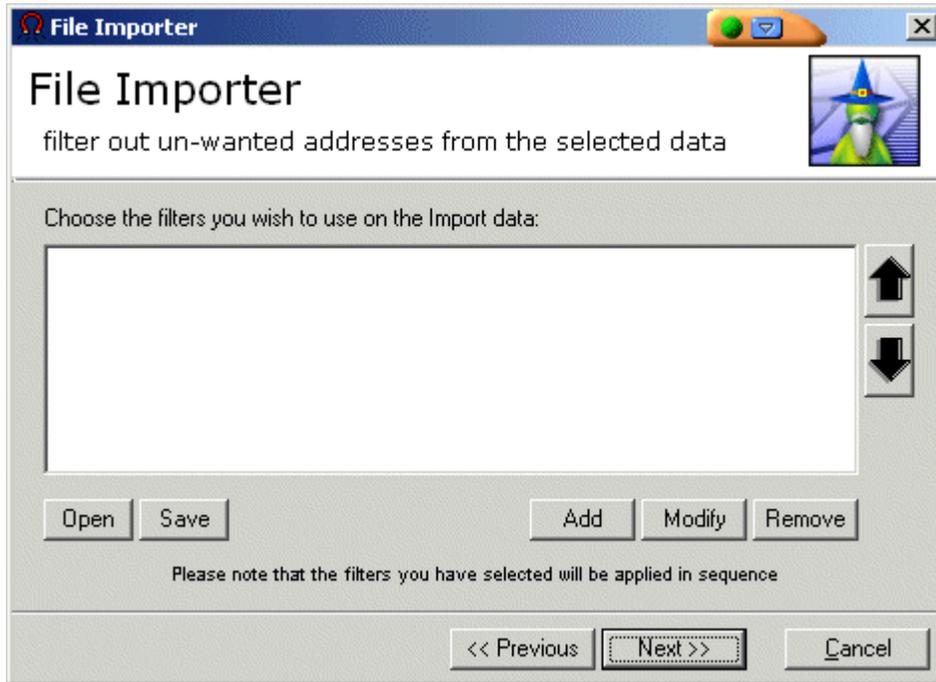
Note: 1/ The file you are importing can have any number of fields. We are only using sample data. The procedure however would be the same for importing data with two fields or forty two. 2/ You do not have to import each field. 3/ The names used beside each field in Group Mail are for guidance purposes only - you can use these fields as you like. The only field that is required is the Email One. There is nothing to stop you putting phone numbers etc. in the name fields etc.

Common Question: What is the Full Name Macro field? Answer: This field should be used when all the name information that you are importing is contained in just one field in your import data (some applications would store the entire name in just one field - Group Mail doesn't do this because of the problems it can cause with personalization). The importer will split the name field up into the various sub parts using typical naming conventions. You can of course avoid this by importing the Name field into either the First Name or Last Name fields.

Click Next to Proceed

Step Four - Filters

For the purpose of this tutorial we are going to avoid filters. The best way to learn how to use these is with experimentation.

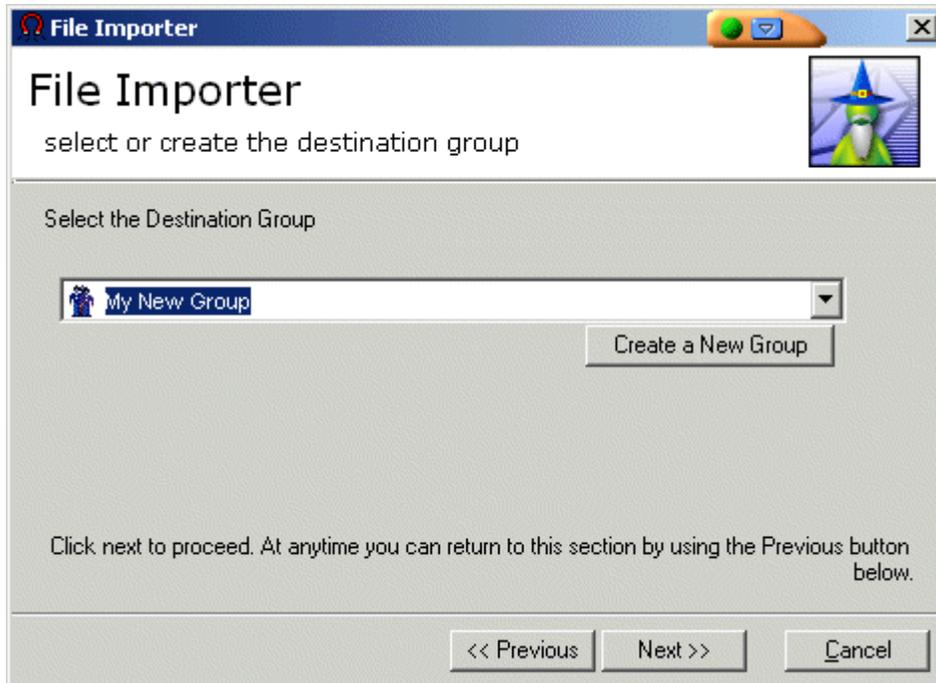


For this tutorial please leave the filters list blank.

Click Next to Proceed

Step Five - Destination selection

Now it time to choose where to import the data to. You need to select the Group you want to use - or you can create a new one.

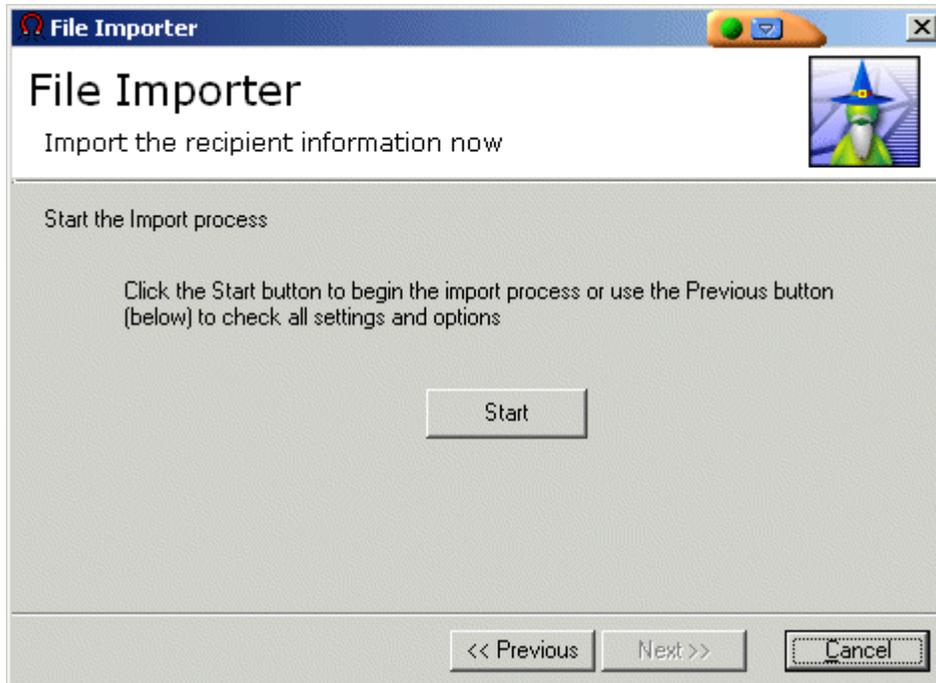


All your current groups are available on the Drop down list (click on the little arrow above the Create a New Group button to expand the list). If you want to import to a new group you should click on the Create a New Group button.

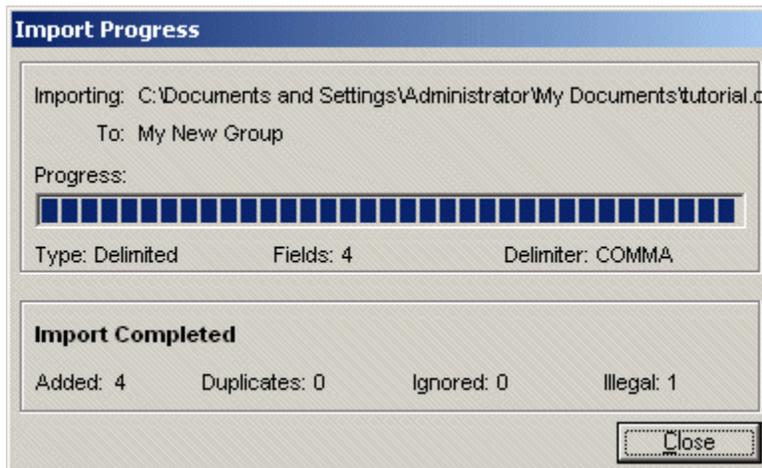
Once you have your group selected you should click Next to proceed.

Step Six - Action!

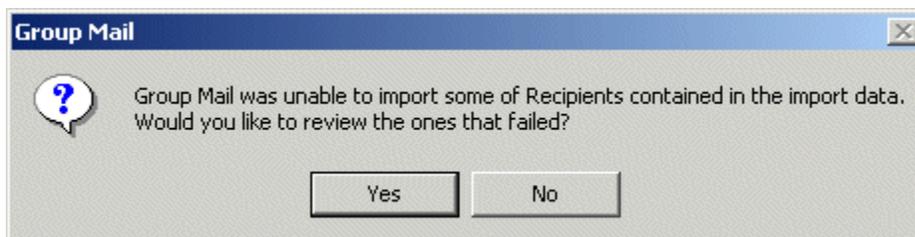
Now you are ready to do the actual importing. At this stage it is still possible to go back and make changes. To do this just click on the Previous Button.



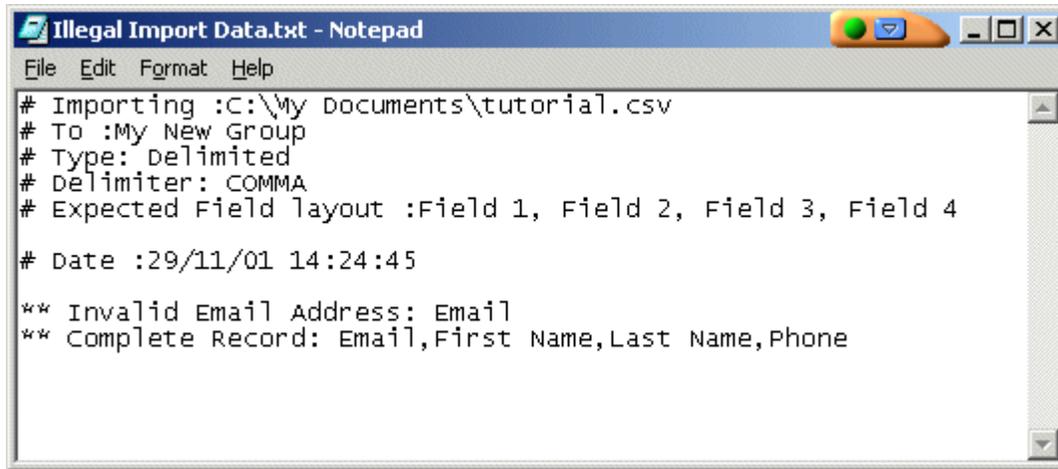
Click Start to Start the Import process.



A progress dialog will then be presented to you showing various details regarding the import job and how it is getting on with it.



If there have been any errors while importing you can review them when the Import concludes. Because the first line in the file we imported contained just the field names and not an actual email address we have errors - just one. Answer Yes to the dialog (like the one above) to see the import log file.



```
Illegal Import Data.txt - Notepad
File Edit Format Help
# Importing :C:\My Documents\tutorial.csv
# To :My New Group
# Type: Delimited
# Delimiter: COMMA
# Expected Field layout :Field 1, Field 2, Field 3, Field 4

# Date :29/11/01 14:24:45

** Invalid Email Address: Email
** Complete Record: Email,First Name,Last Name,Phone
```

This shows us one Error - marked as Invalid Email Address. If we removed the first line from our original text file we would not get this.

You have now successfully completed an import! Please refer to the help file if you require further information.