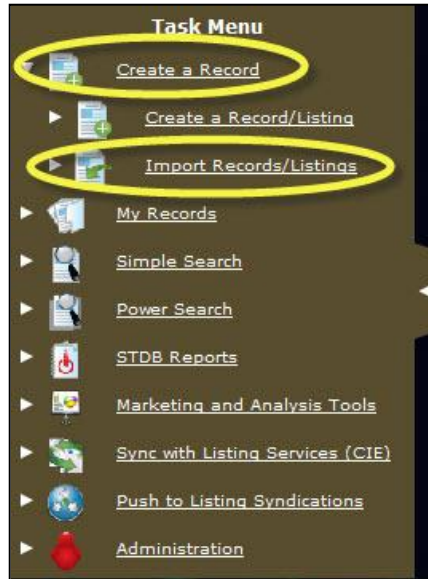


Import Records/Listings Tutorial

The Import Records/Listings feature allows users to create one or more records by uploading an Excel file (.xls or .csv) into CCIMREDEX.

The step-by-step instructions below take you through the process of uploading and using the various functions within Import Records/Listings.

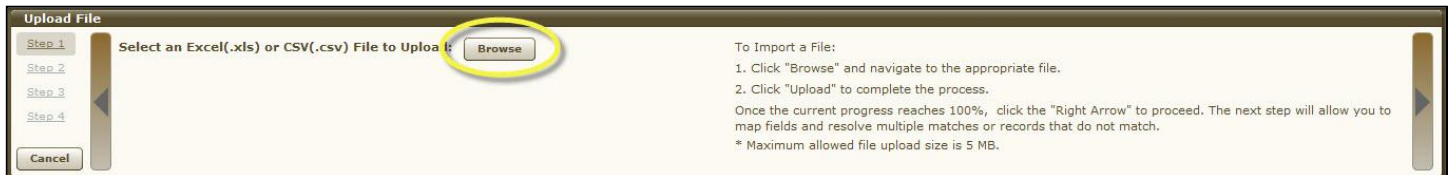
Step 1: Click 'Create a Record' located at the top of the Task Menu. Select 'Import Records/Listings' to begin importing records/listings.



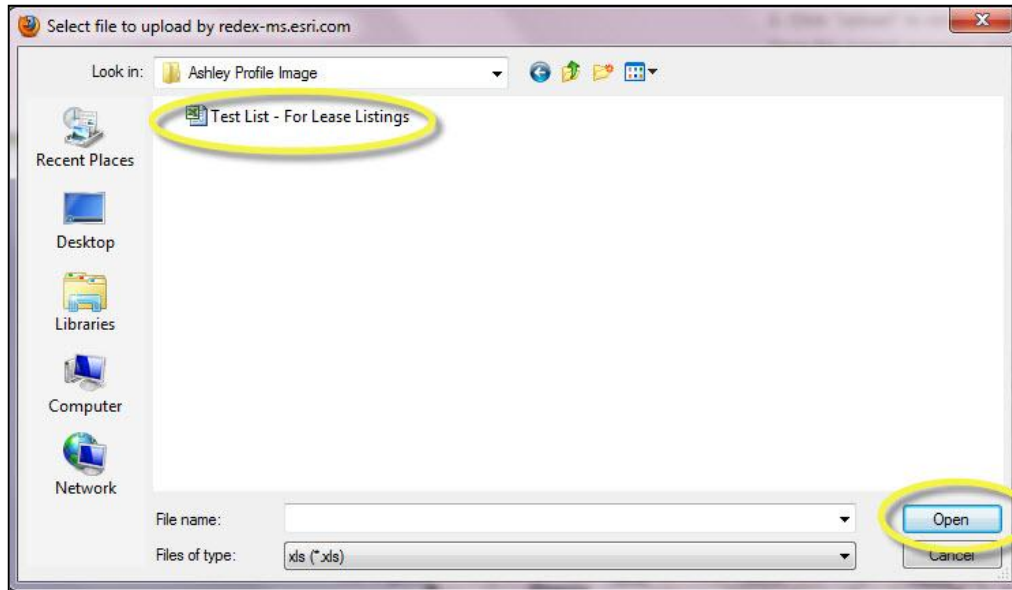
The 'Import Records/Listings' workflow will open at the top of the screen.



To import records/listing, click the 'Browse' button.

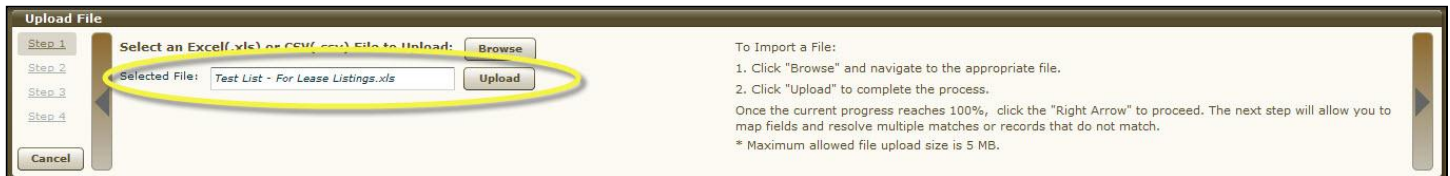


Locate the spreadsheet on your computer that contains the record(s)/listing(s) and click 'Open'.



Click 'Upload' to import the records/listings.

REQUIRED: * Maximum allowed file upload size is 5 MB.



When the image upload is complete, the user will see the below progress bar.



Click the arrow on the right of the workflow to continue to the next step.



Step 2: The user must now set the columns of the imported spreadsheet to match the fields within CCIMREDEX.

In the table, select the appropriate File Field from the drop down menu(s) that coordinates with the appropriate Address Field. The Address Fields are fields within CCIMREDEX. The File Fields are fields that were imported by the user in Step 1.

In order to correctly map the imported records, the Address and File Fields must match properly. If the Address Fields does not have a correlating File Field, leave the File Field blank.

Map Address Fields

Step 1
Step 2
Step 3
Step 4

Set Columns:

Address Field	File Field
City	City Name
Complete Address	
State	State
Street	
Street Name	Street Name
Street Number	Address Number

Select File Field from the drop down to map Address Field.

Set Columns

Cancel

When the user has matched all File Fields with Address Fields, click the 'Set Columns' button.

Map Address Fields

Step 1
Step 2
Step 3
Step 4

Set Columns:

Address Field	File Field
City	City Name
Complete Address	
State	State
Street	
Street Name	Street Name
Street Number	Address Number

Select File Field from the drop down to map Address Field.

Set Columns

Cancel

When the set columns process is complete, the user will see the import results in the table to the right. The table will show if the imported records were *'Matched'* to a location on the map, if there were *'Multiple Matches'* found on the map or if the records had *'No Match'* on the map.

The screenshot shows the 'Map Address Fields' window with 'Step 4' selected. The 'Set Columns' section is complete, with a progress bar and a 'Set Columns' button. The 'Results' section shows a table with 8/10 addresses matched. The table has columns for Index, Street, City, State, and Zip.

Index	Street	City	State	Zip
2	11225 College Blvd	Overland Park	KS	66210-2748
3	12147 Coursey Blvd	Baton Rouge	LA	70816-4410
5	3120 Shelby Dr	Jonesboro	AR	72404-0635
6	193 Versailles Rd	Frankfort	KY	40601-3263
7	142 Old Ridgefield Rd	Wilton	CT	06897-3036
8	1750 N Causeway Blvd	Mandeville	LA	70471-3110
9	1950 Manhattan Blvd	Harvey	LA	70058-3581
10	1206 College Ave	Goshen	IN	46526-4937

If the records were *'Matched'* to a location on the map, they will appear with a green "balloon", as shown below.



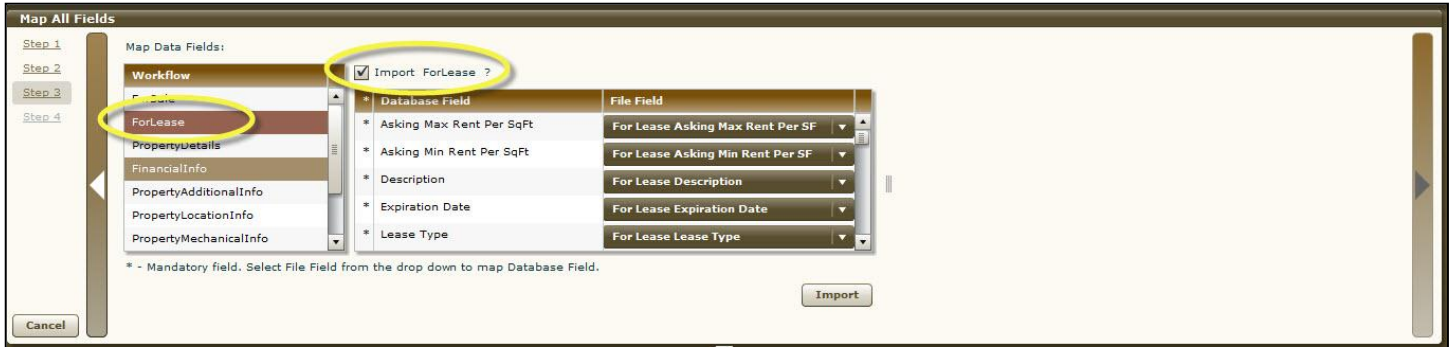
If the records had *'Multiple Matches'*, the user has the option to correct the address(es). Click the *'Multiple Matches'* tab at the top of the table to view the records. To edit the *'Multiple Matches'*, click the address you would like to edit. Click the correct address to change the location of the record. The corrected record will now appear on the *'Matched'* tab of the table and appear on the map.

Once the user is satisfied with the record locations on the map, click the arrow to the right of the workflow to continue to the next step.

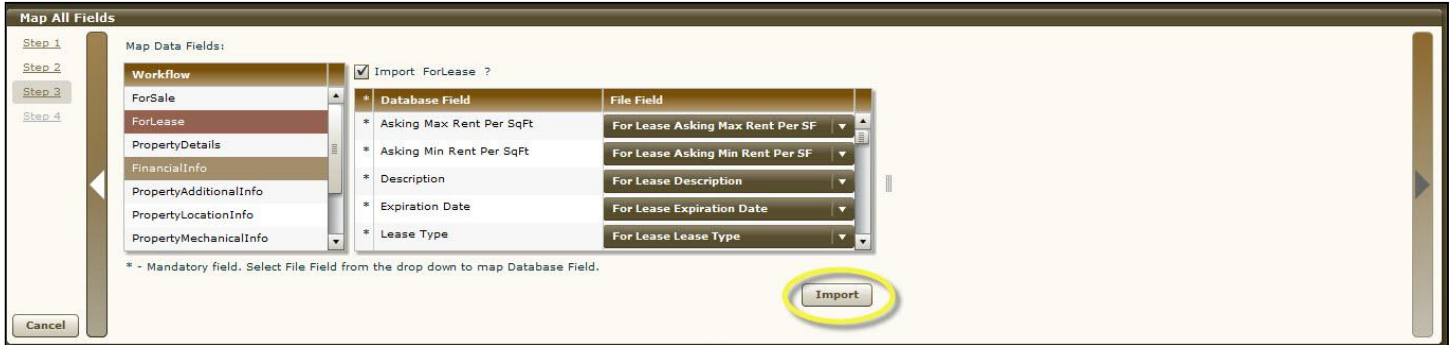
The screenshot shows the 'Map Address Fields' window with 'Step 4' selected. The 'Set Columns' section is complete. The 'Results' section shows a table with 8/10 addresses matched. The table has columns for Index, Street, City, State, and Zip. A yellow circle highlights the right arrow on the right side of the window.

Index	Street	City	State	Zip
2	11225 College Blvd	Overland Park	KS	66210-2748
3	12147 Coursey Blvd	Baton Rouge	LA	70816-4410
5	3120 Shelby Dr	Jonesboro	AR	72404-0635
6	193 Versailles Rd	Frankfort	KY	40601-3263
7	142 Old Ridgefield Rd	Wilton	CT	06897-3036
8	1750 N Causeway Blvd	Mandeville	LA	70471-3110
9	1950 Manhattan Blvd	Harvey	LA	70058-3581
10	1206 College Ave	Goshen	IN	46526-4937

Step 3: The user will now import the additional information from the selected records that was located in the imported spreadsheet. Click 'Map Data Field' on the left. The 'Database Fields' on the right will change to correspond with the 'Map Data Fields'. Check the check box 'Import Details' above the tables to confirm you want to import that information.



Once all 'Map Data Fields', 'Database Fields' and 'Import Details' are in place, click the 'Import' button.



Once all information has been imported, the table on the right will show the import results: 'Imported' and 'Failed'. A reason will be given for all information that failed to import. The user can change it in the spreadsheet and import again, if they choose.

Results:

Imported... **Failed(2)**

8/10 records imported successfully.

Index	Property Name
2	11225 College Blvd
3	12147 Coursey Blvd Suite: First Floor
5	2 - 2,000 SF Suites Beside New Upper Crust Pizza
6	193 Versailles Rd
7	142 Old Ridgefield Rd
8	Great N Causway
9	Manhattan Blvd. Retail Gross Lease
10	1206 College Avenue

Once the user is satisfied with the imported information, click the arrow to the right of the workflow to continue to the next step.

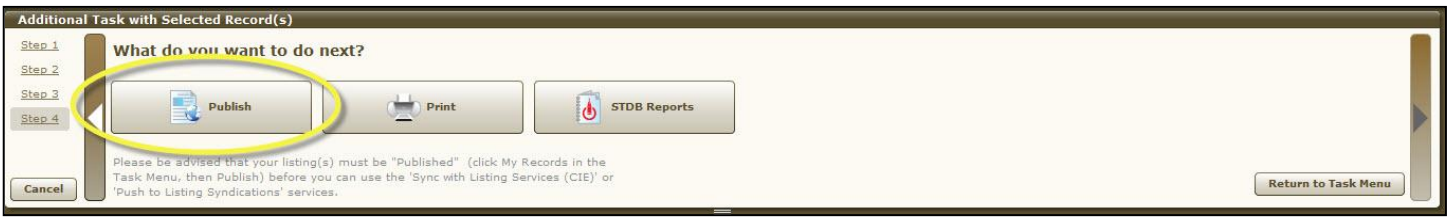


Step 4: What Do You Want To Do Next?

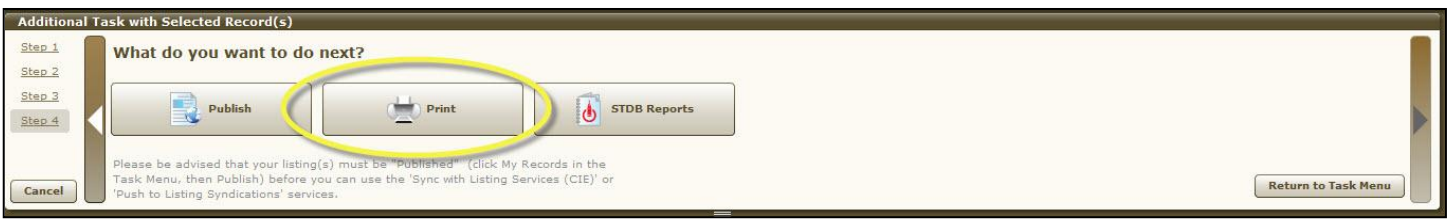


The user has the option to move to other workflows, carrying the record(s) they just imported with them. They now have the opportunity to:

1. **Publish** the record(s) they recently imported.



2. **Print** the record(s) they recently imported.



3. Run **STDB Reports** on the record(s) you recently imported.



If the user does not want to continue to a new workflow with one of the options listed above, they can click the 'Return to Task Menu' button and be taken back to the CCIMREDEX home screen.

