Office Tools Professional®

Excel Importer User Guide

Guide to the setup and proper use of the Excel Importer tool within Practice Management

Table of Contents

Before you begin:

This guide covers the second generation of the Excel Importer tool where all features and functions are contained within Practice Management itself, not in a separate external utility. To utilize the new Excel Importer be sure you're on the latest version of Practice Management. You must have the Contact Manager user right in order to access the Excel Importer.

Import/Export

Import/Export

Overview: This section will show how to access and use Excel Importer's options and functions.

Preparing your data

Most programs that manage contact information have the ability to export that info into an Excel file. This data will likely require "cleaning" before import, due to the fact that not all data is in the correct format for importing. To get your data into the proper format, use our Excel Template (the importer can accept files in the following formats: .xls, .xlsx, .csv, .txt, and .xml).

Each column in the template spreadsheet represents a field in Practice Management. To guarantee a successful import parse your data according to the column distinctions. Splitting up address, for example, so that city, state and zip are in their separate respective columns (like the template suggests) will give you ideal results, as opposed to putting them in the same column separated by commas, which will not. Some columns in the template begin with the letters "SP", this stands for spouse, but you can also put dependant information here.

If the contact you're importing is an individual and you leave the Company Name field blank, by default the importer will set their File As name to Last Name, First Name. Middle initials should follow first names in the First Name column (ex. Anthony B.).

Importing

To access the Excel Import Tool, login to Practice Management and go to Contacts>Import/Export Contacts>Excel Importer>Import.
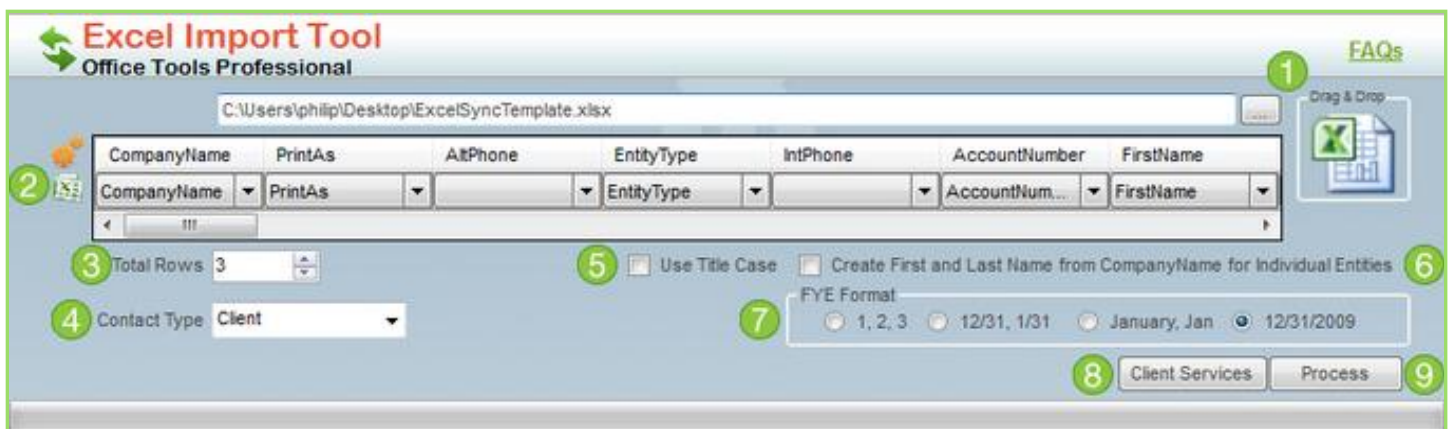
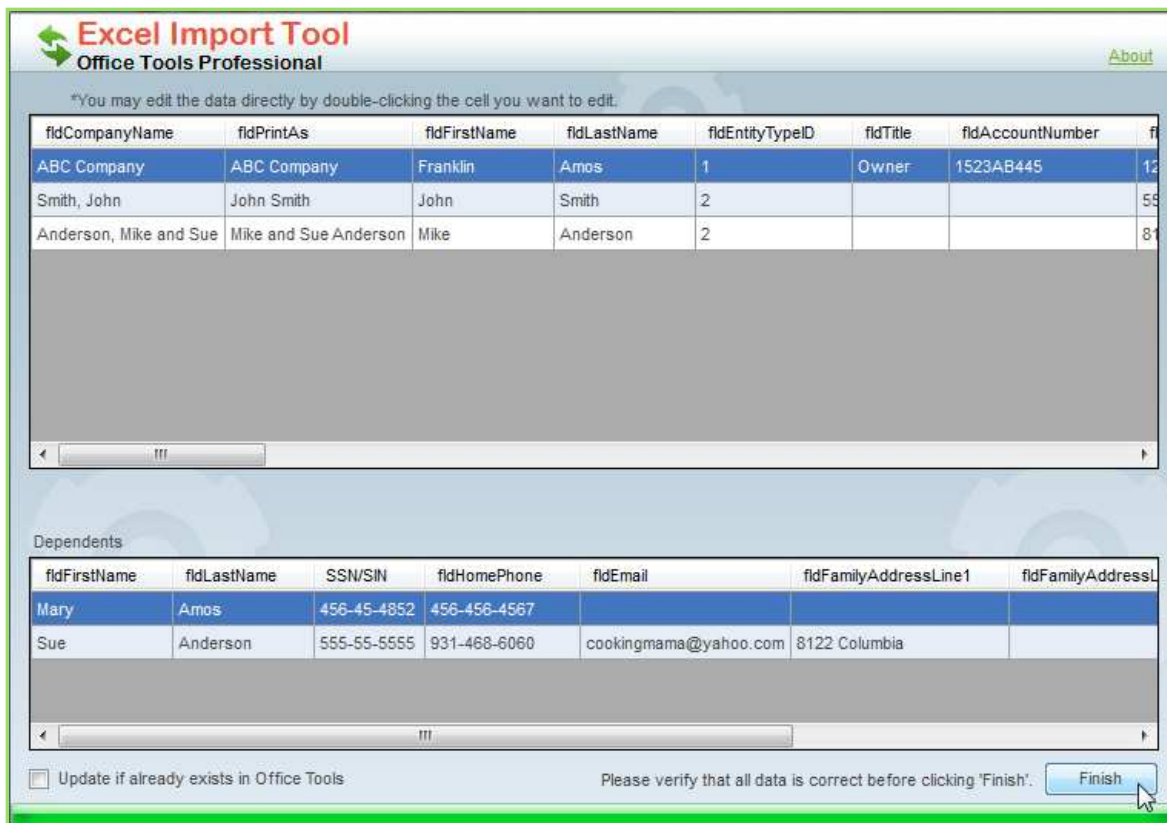You can use the "open file" ellipses or simply **Drag & Drop** the excel file into the Excel Sync Tool to begin.
1. Once you have the Excel file loaded into the tool, verify that the Practice Management fields (the top row) correspond to the correct fields in the Excel file (the bottom row—if you used the template this will be done for you).
2. Verify that the **Total Rows** match the original Excel file total rows.

3. Select the **Contact Type** for the contacts you're importing. You can only import one contact type at a time, so if you wish to import multiple types you will have to split them into separate Excel files and import them subsequently.
4. **Title Case** allows the Tool to change contact names from All-Caps to Title case format. (SMITH, JOHN = Smith, John)
5. If you only have a "Company Name" for individuals (SMITH, JOHN) you can check this option and it will split the Company name into First and Last name for individuals.
6. Choose the format for the FYE date, if applicable.
7. You may also import the contacts under custom **Contact Groups** (Tax client, Bookkeeping Client etc)
8. When you are ready to import click the "Process" button **THIS DOES NOT IMPORT IMMEDIATELY**, you will be give an additional screen to verify the import format is correct.

NOTE: The import tool has the ability to import Alternate Contacts if the company names match, but the First, Last name fields do not. In the example below, Mike Brown would be imported under ABC Company as an Alternate Contact, leaving John Smith as the Main Contact for the company.

	A	B	C	D	E	F
	F4			f_x		
1	CompanyName	PrintAs	FirstName	LastName	IntPhone	AccountNumber
2	ABC Company	ABC Company	John	Smith	1-555-9876	01-545454
3	ABC Company	ABC Company	Mike	Brown		

After processing the Excel file the following window will appear showing you how your data will import. Nothing will be brought into Practice Management until you click the "Finish" button. There's an option in the bottom left-hand corner of this window that says "Update if already exists in Office Tools." If checked the tool will, as you'd expect, update contacts with matching company names, overwriting them with the

Excel Import Tool
Office Tools Professional

About

*You may edit the data directly by double-clicking the cell you want to edit.

fldCompanyName	fldPrintAs	fldFirstName	fldLastName	fldEntityTypeID	fldTitle	fldAccountNumber	fl
ABC Company	ABC Company	Franklin	Amos	1	Owner	1523AB445	12
Smith, John	John Smith	John	Smith	2			55
Anderson, Mike and Sue	Mike and Sue Anderson	Mike	Anderson	2			81

Dependents

fldFirstName	fldLastName	SSN/SIN	fldHomePhone	fldEmail	fldFamilyAddressLine1	fldFamilyAddressL
Mary	Amos	456-45-4852	456-456-4567			
Sue	Anderson	555-55-5555	931-468-6060	cookingmama@yahoo.com	8122 Columbia	

☐ Update if already exists in Office Tools   Please verify that all data is correct before clicking 'Finish'.   Finish

information in the Excel file. If this option is not checked and a contact already exists in Practice Management with the same company name, the tool will skip that entry on the Excel file and do nothing. Once you are satisfied with the contact information and format click "Finish". **THIS WILL IMPORT ALL DATA.**

Exporting

To access the export feature of the Excel Import tool, go to Contacts>Import/Export Contacts>Excel Importer>Export.

Contacts can be exported from Practice Management to .csv or .xml files. Check the boxes of the fields you want included in the file. You can filter the contacts info to be exported by Contact Type and Entity Type. Designate the Save Path at the top of the window to determine where the export file will be saved.
`

Export for BizActions: this option produces a file tailored to BizActions' import requirements.