

### Before You Begin: Important Notes

The following is a brief description of the additional contact feature available as part of the import routine. This allows the user to add additional contacts to existing records when they match on the main record “key fields” and the FName and LName do not exist in that main record “key fields” match.

#### NOTES:

- It is critical to have “uniqueness” of the main record keys because if a match is found but there are multiple records that match, the system will append the contacts only to the first record it finds.
- Note that fields used as keys are used to define exact matches. The system will not define it as a match if the spelling, punctuation or spacing is different.

### Using the Additional Contacts Function

This feature is invoked by answering **Yes** in the Import Wizard – Additional Contacts screen (2nd to last screen in the Import Routine). If you choose No, then there is no matching of import records to existing workgroup records and duplicates records may be created.



Import Wizard - Additional Contacts

Load additional contacts?

Yes No

When you choose Yes, the system will then prompt you to identify which of the mapped fields in your import are to be used as the “key fields” for matching to the records in the database.



Import Wizard - Additional Contacts

Specify key(s) to determine additional contacts.

FIRSTNAME

LASTNAME

TITLE

BUSNAME

STREET

CITY

STATE

ZIP

Apply matching to campaign only. (TESTING)

Yes  No

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FName and LName are grayed out because those are the two fields that the system will attempt to match in any records that match based on “key” fields. In the example above, the “key fields” in the main record that will be used to match against are → Company (Business name), City, State, Zip.

You can also specify whether the “key fields” match should be done against all records in the workgroup or just those for the campaign designated in your import template. This is set by the Yes/No radio buttons below the key fields.

## Logic for Different Match Conditions

### *No match on “key” fields*

- Import record will create a new record in the workgroup and attach a primary contact to it.

### *Match on “key” fields but no match on FName / LName*

- Import record will add a secondary contact to the existing record it matches against. If there are multiple records that match, the contact will be added only to the first record.
- Note that in this case, the import will ignore all other non-contact fields in the import record. Only the contact information for the additional contact is appended to the existing record.

### *Match on “key” fields and match on FName / LName*

- Import record will be dropped (skipped).

## View Imported Records

After the import is completed, the View Imported Records function under Add New Records displays the Import Load detail including:

- Number of Leads (created)
- Number of Contacts (added)
- Number of Contacts Skipped (3rd condition above)