System Admin:
Import Stakeholders

Tractivity® Help Guides
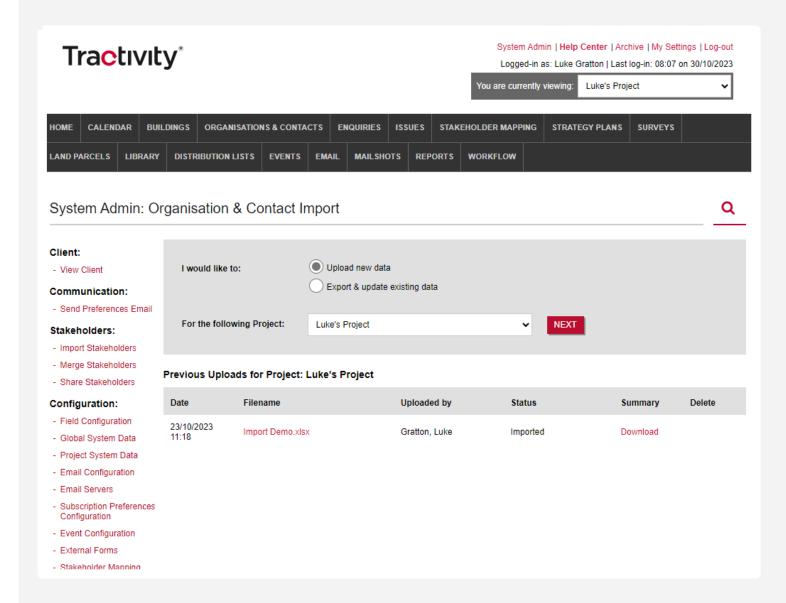
Import Stakeholders

Tractivity's Import Tool allows you to add your stakeholders in bulk to your project(s)

It is modelled to your project requirements. You can add the category/interest data against your organisations & contacts you set up during onboarding.

You can:

- Avoid admin time and import up to 2,500 rows of stakeholder data at once.

- Download a template set up for your project fields.
- Validate your data and review summaries prior to upload.

- Upload data at any time. Hosted an Event with 80 invitees? Upload their information via Import and save time.

Download your Import Template

To get started, download your data template:

1. Go to **System Admin**
2. On the left-hand menu, under **Configuration**, click **Import Stakeholders**
3. Select **Upload new data**
4. Select the project you'd like to import to from the dropdown and click **Next**
5. Click **Download Template**

Your template will be downloaded into your browser in the following format:

Tractivity Import Template (1).xlsx

Your Template

The template consists of three sections:
Organisation, Contact and Building

Below are some rules that must be followed to import successfully:

1. Mandatory fields are highlighted in red

2. Mandatory fields are only relevant within each section. For example, if you add any Organisation data, all mandatory fields within the Organisation section must be completed. This example would be the same for the Contact and Building sections.

3. When adding values to multi-select fields such as Stakeholder Categories, use a pipe symbol (|) to separate the different options.

4. All Data is imported on a row-by-row basis and data entered on the same row will be linked inside Tractivity. So, if you enter an Organisation, a Contact and a Building all on the same row, all of these records will be linked together.

5. To add an Organisation with multiple Contacts, please enter each contact on a new row, with the same organisation information.

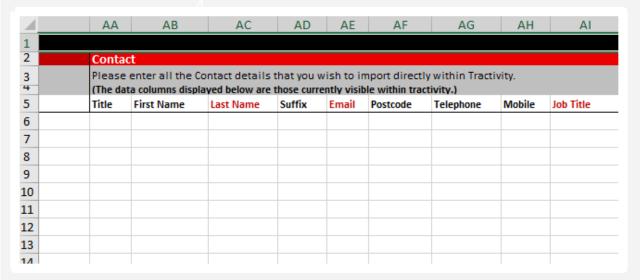6. You can add a contact by simply only completing the information in the contact section. Same applies for Organisation and Building,

1

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	This template is for use in the Luke's Project project.												
2	Organisation												
3	Please enter all the Organisation details that you wish to import directly within Tractivity.												
4	(The data columns displayed below are those currently visible within tractivity.)												
5	Organisation Name	Account Handler	Account Group	Telephone	Telephone 2	Mobile	Email	Email 2	Website	Legal Status	Stakeholder Categories	Organisation Sector	Organisation Categories
6													
7													
8													
9													
10													
11													
12													
13													
14													
15													
16													
17													
18													
19													
20													
21													

Please note these screenshots are for illustrative purposes only. Your dedicated Customer Success Manager will arrange a call to run through the Import Template with you before any data is uploaded to Tractivity.

	AA	AB	AC	AD	AE	AF	AG	AH	AI
1									
2	Contact								
3	Please enter all the Contact details that you wish to import directly within Tractivity.								
4	(The data columns displayed below are those currently visible within tractivity.)								
5	Title	First Name	Last Name	Suffix	Email	Postcode	Telephone	Mobile	Job Title
6									
7									
8									
9									
10									
11									
12									
13									
14									

Duplication Rules

The Import Tool will always complete a duplication check during the upload of your data.

These rules can always be found on our Import page inside your system, so you never need to keep a copy handy.

Illustrative Examples:

Organisation:

If you have 1 organisation called 'Tractivity LTD' and another called 'Tractivity' the system will see these as 2 separate organisations. **Make sure you're happy with spelling and formatting before uploading.**

Contact:

If you have a contact with the same first, last name and email address twice

e.g. *John, Smith, jsmith1@gmail.com* this will be matched into 1 contact.

But don't worry – slight changes will be picked up and a new contact would be created.

We recommend each row contains unique data to prevent any mistaken duplication.

1

2

3

Dupe Check Rules

Tractivity will check for duplicates using the below rules. If a duplicate is found, the existing data inside Tractivity for that record will be updated.

- **Organisations**
  - Existing organisations with the exact same name will be updated.
- **Contacts**
  - There is a *three-step* duplication check for contacts:
  - **Step 1** - Existing contacts with the same Email address, First Name and Last Name will be matched and updated.
  - **Step 2** - *Performed if no matches found in Step 1*
    - If no matches are found in step 1, contacts with the same Firstname AND Lastname will be updated (only if their Email is blank).
    - If no matches are found in step 1, contacts with the same Email AND Lastname will be updated (only if their First Name is blank).
  - **Step 3** - *Performed if no matches found in Step 2*
    - If no matches are found in step 2, contacts with a Lastname will be updated (only if their First Name AND Email is blank).
- **Buildings**
  - Existing Buildings with a matching Building Name / Number & Road, Town and Postcode will be matched and updated.

Validating your Data

The Import Tool will check your data for errors once you have populated the template.

1. Under Step 2, select **Yes or No** to check for duplicates across projects (please note: you can have the same contact in more than one project)

2. Click **Choose File** and select the template. We recommend renaming once complete.

3. Click **Upload and Validate**.

Step 2: Upload and Validate the Template

Once you have populated your template, upload by using the **Choose File** button below and click **Upload and Validate**. Once the Validation is complete, you will be informed whether the upload was a success or failure. In both cases, a summary document will be available to download.

- On failure, this document will describe any issues and in which cells they occur.
- On Success, this document will list the numbers of records that will be updated and added to Tractivity. The document will also list any new system data that will be added to your Tractivity system, as part of the upload. **Please review these carefully**, ensuring that there are no typos and that you are happy for all options to be added to your system.

Top Tip - Please ensure that any towns added within the summary document are valid towns and not roads or counties entered in the wrong column.

Would you like to check for duplicates across multiple projects?   No ▾   1

CHOOSE FILE   2 | Import Demo.xlsx | UPLOAD AND VALIDATE   3

Image 1
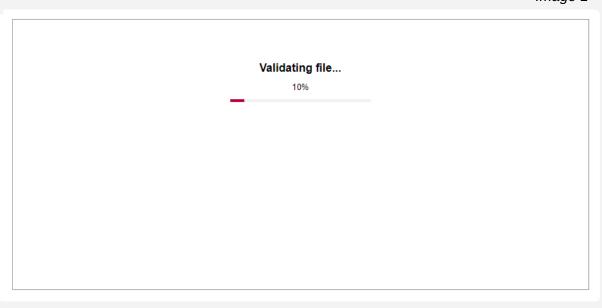
Validation & Summary

The Import Tool will validate the file and return either **success** or **errors.** *(Image 1)*

Regardless of the outcome you should click **Download Summary** so you know exactly what data is being added to your project. *(Image 2)*

Once clicked, the Summary will appear in your browser downloads in the following format:

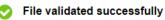**[FileName].xlsx_Summary_DD_MM_YYYY HR_MIN_SEC.xlsx**

Validating file...

10%

Step 2: Upload and Validate the Template

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Top Tip - Please ensure that any towns added within the summary document are valid towns and not roads or counties entered in the wrong column.

✅ **File validated successfully**   DOWNLOAD SUMMARY

Name: Import Demo.xlsx
Size: 13Kb
Line count: 1
Projects: Luke's Project

Please click the button to download a full summary.

Image 2

Correcting Data Errors

You will not be able to upload your data until your data has successfully been validated.

Any errors can be seen when you download your **Summary**, specifically on row 14 **Data Errors.**

1. Cell will tell you which cell the error was found in.

2. Issue will tell you what needs to be corrected.

3. New Field Values listed here will be all the new drop-down options that will get added to your Tractivity system. Always review these to check duplications aren't been added this may include variations of spellings.

Please note: you need to amend these changes in the **original** excel you uploaded. **Once all errors have been corrected, you will need to run the validation process again.**

Import Data

Once you're happy and the data has been successfully validated you can import the information to the system.

1. **In Step 3**, click **Import Data**

Depending on the file size it may take a little while for all the information to be fully imported

Congratulations!

You have successfully imported stakeholder data into your system.

We recommend you review this under 'Search: Organisations and Contacts'

2. To import more data, simply click **Import More Data** and repeat the steps provided.

Step 3: Import the Data

If you would like to update your spreadsheet or re-start the upload data process, then click on the Cancel button.

Once you have reviewed the Summary Document and you are happy that all System Data options being added are correct, please click the Import Data Button. This will add all data within your spreadsheet into Tractivity.

Please be aware that once you start the import process, this cannot be stopped and data within your Tractivity system will be added or updated. If you have any concerns at all, please contact the Tractivity support team support@tractivity.co.uk.

(1) [IMPORT DATA]   [CANCEL]

Step 3: Import the Data

If you would like to update your spreadsheet or re-start the upload data process, then click on the Cancel button.

Once you have reviewed the Summary Document and you are happy that all System Data options being added are correct, please click the Import Data Button. This will add all data within your spreadsheet into Tractivity.

Please be aware that once you start the import process, this cannot be stopped and data within your Tractivity system will be added or updated. If you have any concerns at all, please contact the Tractivity support team support@tractivity.co.uk.

✓ **Data Imported Successfully**   [DOWNLOAD SUMMARY]

(2) [IMPORT MORE DATA]

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