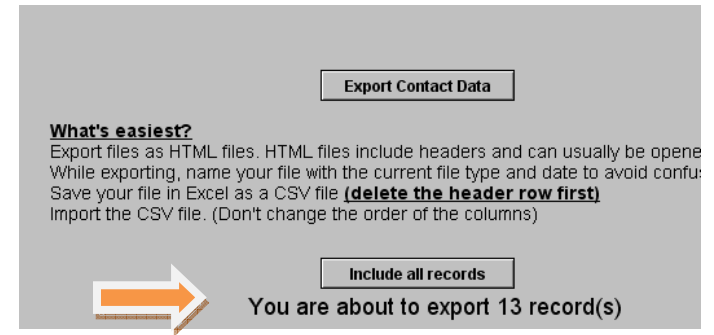


## CONTACTS – IMPORT/EXPORT SINGLE USER CRATE PRO 5 (CP5)

*We strongly suggest that you have a current back-up of your data before importing*

### EXPORT –

- Click on the Contacts Module and at the top of the screen click on **Import/Export**
- Click on **Export**.
  - At the bottom of the screen you'll see the number of records you're exporting.
  - If you filtered your records through a **Find** your export may not include all the contacts in your database. If you intended to export all records, click on **“Include all records”** to export all contacts
  - When ready click on **“Export Contact Data”**
- Exporting as HTML will give you headers for your columns. This is easiest format for a report. Exporting as CSV will not include headers. Both files will open with Excel. (HTML can be opened in your web browser but may not be modifiable)



### IMPORT –

- You can easily import a CSV file of your contacts but you must maintain the column structure, column order and number of columns that Crate Pro 5 uses. Please look at the column headers in the graphic below. There are 20 columns. Your contact information in your spreadsheet must have the data entered in the same order.

ContactNo	Company	Address	City	State	Zip	Country	Phone	Fax	EEmail	FirstName	LastName	URL	Type	Active	Sync	Mailings	AddToLabor	AddToMaterials	BillingCode
100001	Deploy Tech	815 S. Volusia Ave, #9	Orange City	FL	32763	USA	800-577-2447	407-386-3434	info@cratepro.com			www.cratepro.com	Customer	1	1	1	0	0	

- Collect your contact data from your outside source (Quickbooks, ACT, etc..) and save it as a CSV file (comma separated values)
  - You can create the headers if you find it easier but it's important that you **DELETE** the header row before you import your data.
  - To duplicate some of the data in a column from row to row, such as the country, you can copy/paste or click on the lower right corner of a cell and drag downward into the cells to copy the data.
- When your CSV contact file has the data as you want it to be, delete the header row if you created one and save the file in the CSV format. Depending on how often you intend to import data you may want to name the file with the date. (Note: Look at the explanation of columns below to ensure you have complete data)
- In Crate Pro 5 – Contacts module, select **Import/Export**. Then select **Import > Import CSV Contacts**. Check your data.

- Explanation of Columns:
  - ContactNo- this field must be filled in and must be unique. CP5 assigns a sequential number based on your Set-Up information. You may assign your own unique contact ID but note that you'll find it easier to sort and/or find a contact if you use sequential contact ID numbers.
  - Type- Can be Customer / Vendor / Business Partner / Other / Friend / Do Not Contact / Edit. By entering the type of contact you'll more easily be able to use the Advertising features of CP5
  - Active – Enter 1 in this field if this is an active customer. If this field is left blank then this customer will not be available to select when you create a new design or job
  - Sync – Enter 1 . This is a field designed to allow you to synchronize your contacts with a Palm Pilot or Smart Phone. This function is not active at this time.
  - Mailings – Enter 1. This is allow you to use the Advertising feature of CP5 and have this contact be able to appear in your finds if they meet your search criteria for a mailing.
  - Add To Labor – Enter 0 or enter in decimal format any additional markup you want to charge this contact for labor, which will be over and above what has been set for your company in the Setup module.
  - Add To Materials – Enter 0 or enter in decimal format any additional markup you want to charge this contact for materials, which will be over and above what has been set for your company in the Setup module.
  - Billing Code – Generally used for crates being built for an internal company department. CP5 does not check to see if this is a unique number.

This is based on testing the import/export feature of Crate Pro 5 single user. If you find any errors or would like to make suggestions, please email [support@cratepro.com](mailto:support@cratepro.com)

Updated: August 4, 2009