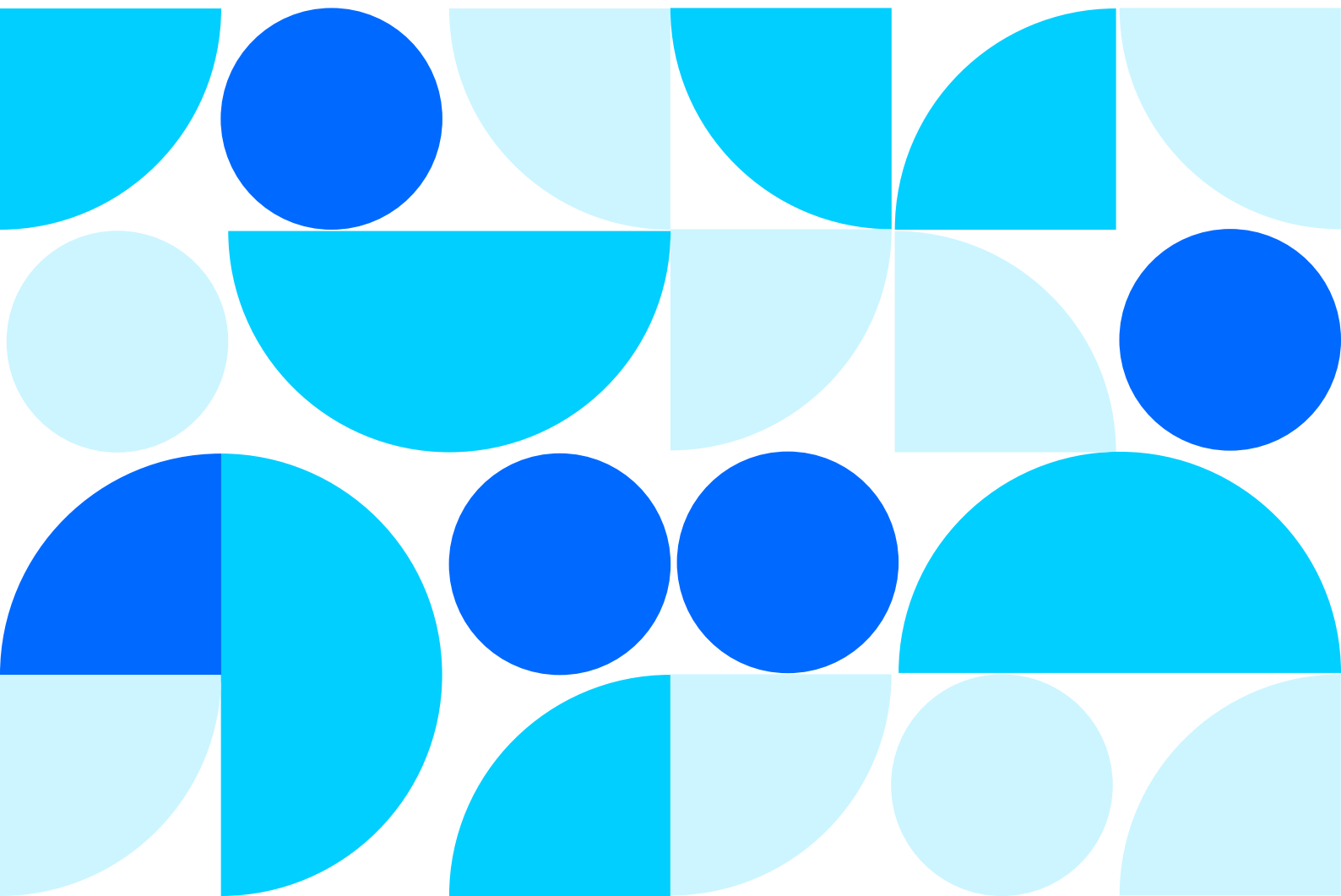




Data Import Guide



Introduction

Importing your data into Hire Insight is not complicated but does require some steps to ensure that each element is imported to the right field and in such a way that it gives you maximum benefit on a day-to-day basis.

In this document we explain:

1. What file types you can import
2. How to structure those files
3. Preparation steps before import
4. Import Tips

Don't worry, these are all easy things to achieve and don't require any technical skill at all.

However, if you are unsure about something, please give us a call, we're happy to help and a call to confirm something is often much quicker than unpicking mistakes afterwards.

1. File Types

Files you can import: .xls, .xlsx, .csv

Files you cannot import: .numbers, .gsheet, .xlsm

2. File Structure

Your spreadsheet should be organised with one tab and have the data in columns. I.e

Column A = First Name

Column B= Last Name

etc

Like this

	B	C	D	E	F	G	H	I	J	K	L
1	LAST NAME	JOB TITLE	ORGANISATION	LINKEDIN URL	TAG	CUSTOM FIELD	EMAIL	CITY	COUNTRY	SALARY	TARGET SALARY
2	Marcheterre	HR Director	Paul Harris	https://Linkedin.com/in/christabel@marcheterre	Exec	Prospect	christabel@demoemail.com	Décines-Charpieu	France	€ 156,000	€ 187,000
3	Fleming	Customer Experience Director	Roadhouse Grill	https://Linkedin.com/in/kyle@fleming	Exec	Candidate	kyle@demoemail.com	Leeds	UK	£97,000	£105,000
4	Nicholls	HR Director	Success Law LLP	https://Linkedin.com/in/louie@nicholls	Exec	Client	louie@demoemail.com	Edinburgh	UK	£180,000	£200,000
5	Mazuret	Marketing & Sales Director	Consumers Express	https://Linkedin.com/in/therese@mazuret	Exec	Candidate	therese@demoemail.com	Thines	Belgium	€ 165,000	€ 185,000
6	Berg	CEO	Security Sports	https://Linkedin.com/in/mario@berg	Exec	Client	mario@demoemail.com	Dresden	Germany	€ 200,000	€ 280,000
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not:

Row 1 = First Name

Row 2 = Last Name

Tips:

- You will find it helpful to add the name of the field you want to import that column to in the column description row
- There must not be any empty columns or rows - our algorithms treat these as 'the end of the line' and don't go any further looking for data to import. Hence anything after a gap row or gap column will not get imported

3. Import Preparation

If you want to import something into a 'custom field' you will need to create the custom field before starting the import.

This is done in the Settings area of Hire Insight, in the Contact fields area.

Standard contact record fields in Hire Insight include:

Title	Email - Work	Address - Home
First Name	Email - Other	Address - Other
Last Name	Phone - Home	Social URL's - LinkedIn
City	Phone - Work	Social URL's - Facebook
Country	Phone - Main	Social URL's - Twitter
Headline	Phone - Mobile	Social URL's - Github
Source	Phone - Other	Social URL's - Slideshare
Salary	Web URL's - Business	Social URL's - Instagram
Desired Salary	Web URL's - Personal	Pinterest - Pinterest
Tags	Web URL's - Blog	Social URL's - Youtube
Email - Personal	Address - Work	Contact Owner

Types of Custom Fields you can add

Single-line Text Box	Number
Multi-line text Box	Currency
Tick Box	Single-option select box
Date	Multi-option select box

Popular Custom Fields that many of our clients like to create are

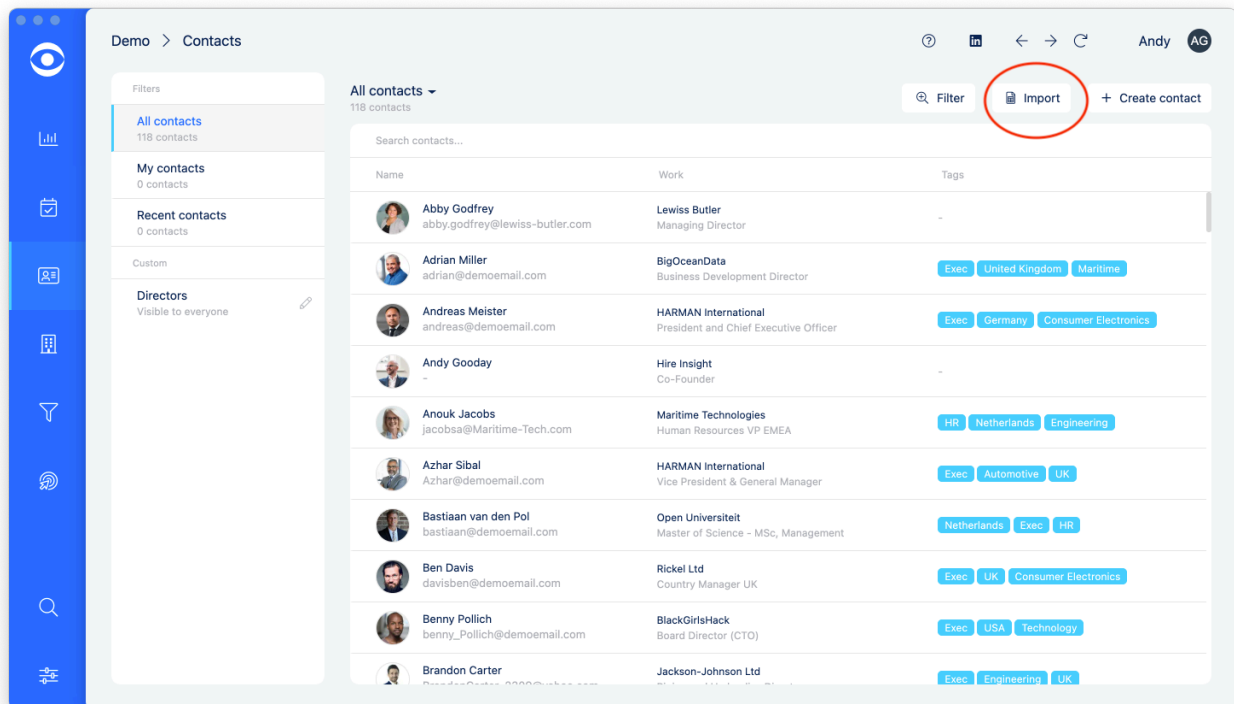
Contact Type: for example; Lead, Client, Candidate, Referee

Notice Period: Single Line Text Box

4. Import Tips

How to start your import:

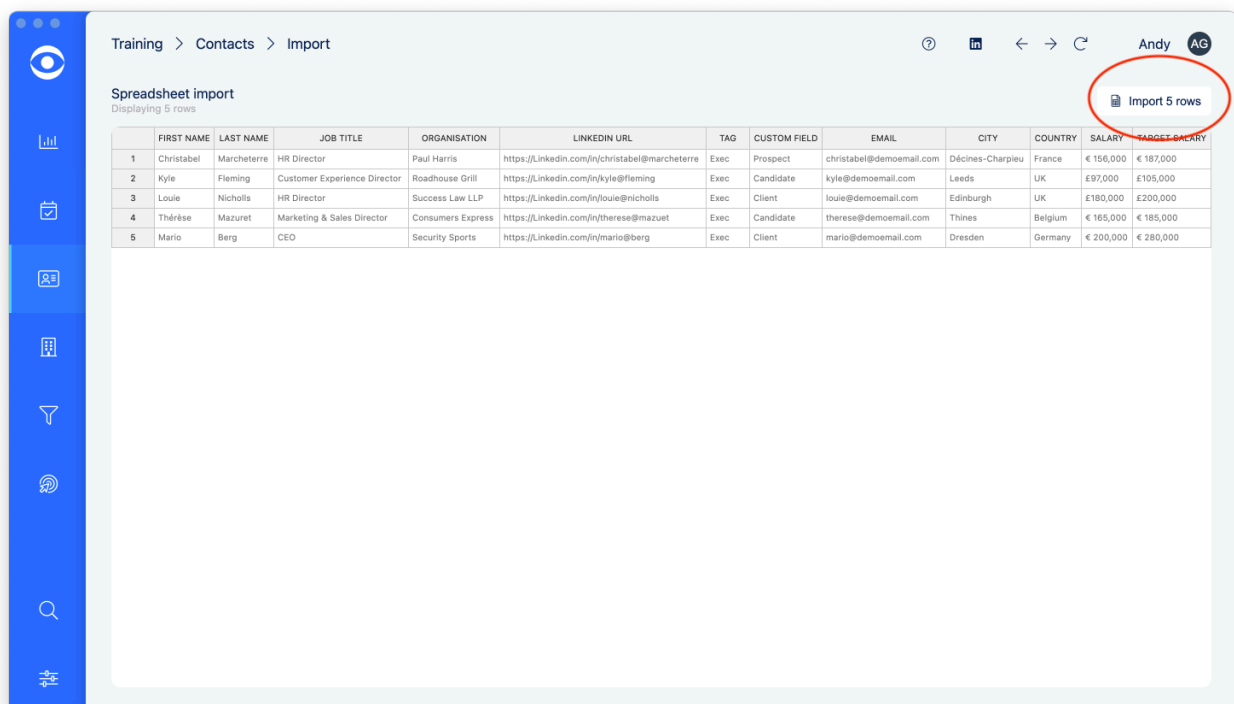
Imports are started in the Contacts area by clicking the Import Button



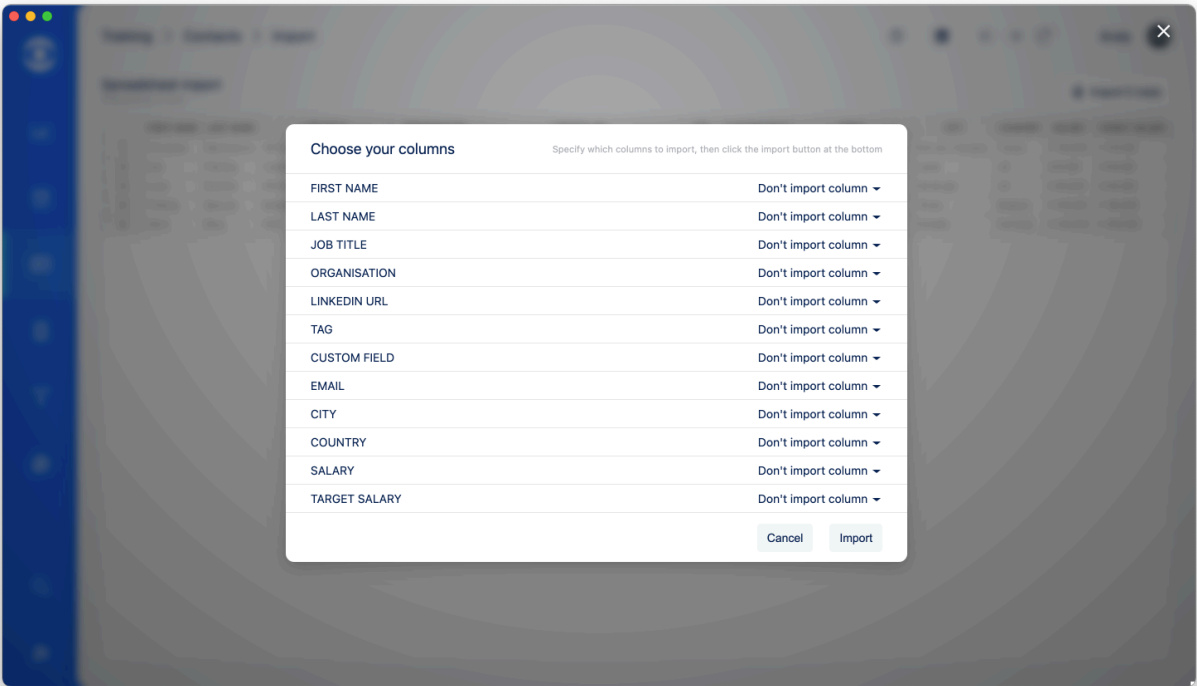
Mapping Your Columns to the right field

Take your time with this process, and take care not to map a column to the wrong field. A common mistake is to mix up the location info (city and country only, used for some of the mapping functions) and the address info.

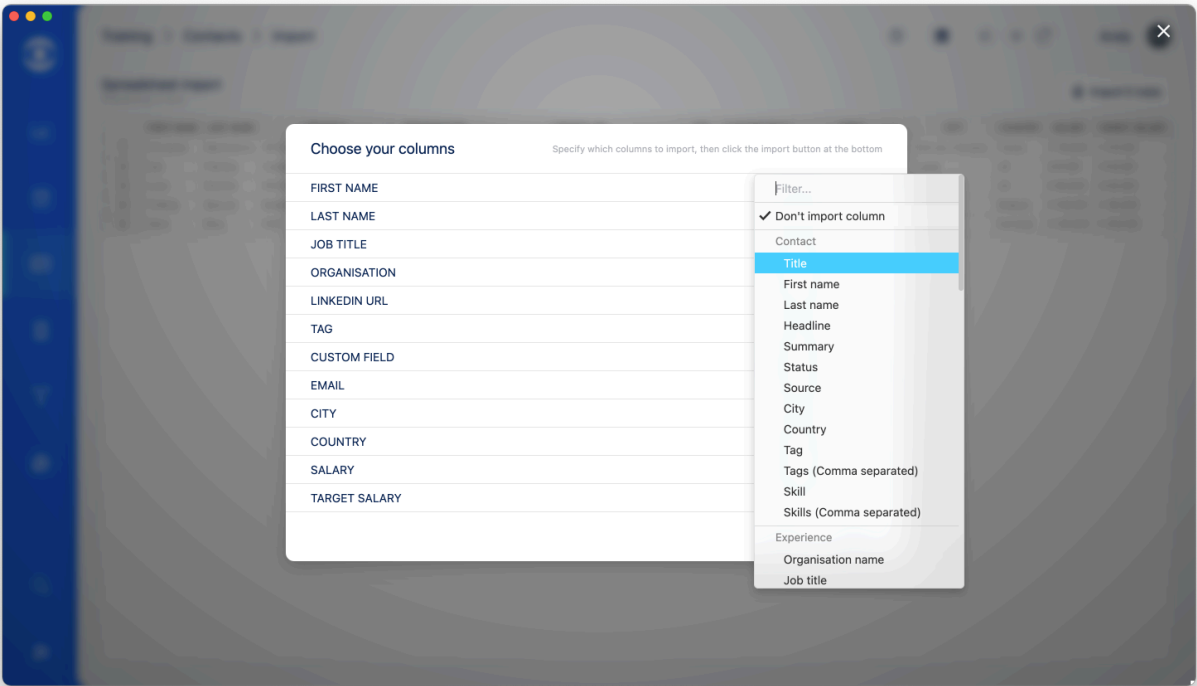
This is the first screen you see after dropping your spreadsheet in.



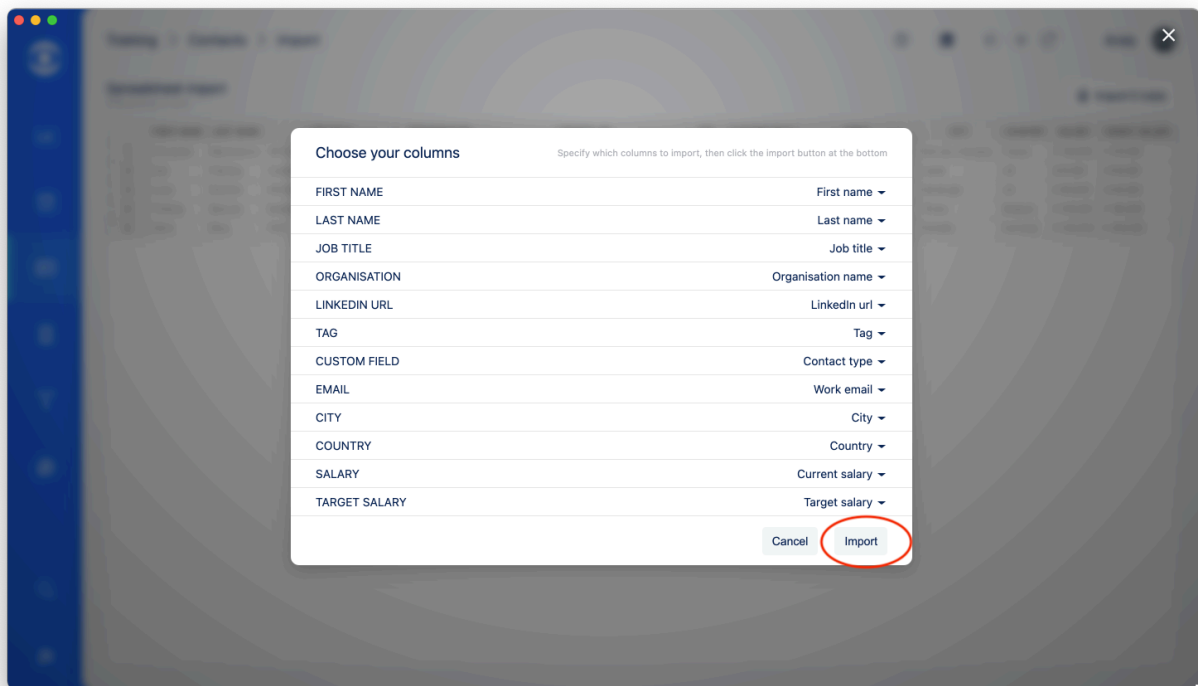
After Clicking the Import X rows button, you will see this screen



And see these field options (and more by scrolling up/down) for each column that you want to import. Select the field you want for each column.



Lastly, click the Import Button



Finally you will see this screen. The app is working in the background to import your data, which for large numbers of contacts can take some time, so don't close the app, let your machine go to sleep or switch it off. Doing so will end the import.

