How to Import Contact or Venue Records

To import Contact or Venue records, you must first download the required template. This can be done with the following process:

- Hover over **My Account** and select **Administration**

- Select **Import Data** from the Data Management section on the left-hand side

- Choose the relevant section from the sub-menu on the left-hand side. For example, select 'Staff' if you wish to import Staff records

- Click on the **Actions** button and select **Download Template** to download a .csv template, which can be opened as a spreadsheet

Your data can now be added to the spreadsheet. When compiling the data, please keep the following points in mind:

- Each column on the sheet corresponds to a field contained on the registration form for this type of record (e.g. Participant, Staff, Venue)

- Each row on the sheet will create a new record of this type

- If a field on Views is set as Compulsory, the corresponding column must be completed on each row of the sheet. Other columns may be left blank if necessary

- If a field on Views has a specific validation, the corresponding column must meet this validation. For example, if the field has the validation Numeric, then this column must contain only numeric values
- The values in each column need to match the exact values that you use in Views. For example, if you have an Ethnicity field on Views, with an attached list that contains the value 'Not Specified', then the value on the spreadsheet must exactly match 'Not Specified', including spaces, casing and spelling

- The data can be put together in any file format but must finally be saved and uploaded in .csv format

One you have finished compiling the data, save your file. To import the records:

- Click on **Choose file** and select your file

- Click **Upload File**

If there are no issues with the data, a 'SUCCESS' message will be displayed, and the records will be created. If there are any issues with the data an error report will be downloaded. The most common issues to be aware of are:

- **Unexpected value** – at least one of the values does not match the values that are used in your Views account

- **Invalid date** – at least one date is not in the format DD/MM/YYYY

- **Invalid postcode** – at least one Postcode is not recognised as valid

- **Invalid email address** – at least one email address is not in the required format

- **Required field** – at least one required field has not been completed

One you have fixed the errors, save the sheet and repeat the upload process.