Contact

Introduction

It is important that the data to be imported are cleaned before import to assure high quality so that it can be used efficiently by the marketing tools.

Contacts can be imported by the customer using SAM or by a service executed by SecuTix.

The customer give the contacts in a file that respect the SecuTix format

In special cases Contact data can be imported from a non SecuTix formatted source. A special project will be set up for this.

The contacts are individuals or structures.

The contacts can be qualified with various criteria and the structures can be qualified with various type of structure.

Services provided

For the contacts the followings services are provided

- Create new contacts (With SAM or as a service)
- Update contacts (With SAM or as a service)
- Inactivate contacts (As service)
- Anonimize contacts (as service)
- Delete contacts (As service)
- Qualify our contacts: define criteria's for the contacts (As service)
- Qualify our structures: define type of structure (As service)
- Special service: Import from non SecuTix formated data (As service)

Prerequisites

To be able to import contacts, you need following tasks to be finished

- The contact data must be cleaned: Adress must be correst, duplicated must be removed, older data must be deleted
- The structure types, if any, must have been defined (see Setting a criteria or a structure type to a contact)
- The criteria and criterion elements must have been defined (see Setting a criteria or a structure type to a contact)
- Each contact has a contact number. New contact imported in SecuTix must have non existing contact numbers. The contact numbers of the source system can be keep and imported. (A specific range is reserved for existing contact numbers)

File formats

For all imports as a service, the file format is described in Contact import Format (Extended) and example Excel files are given. If this format is not respected, special actions have to be performed on the input files and may imply higher costs.

No information is mandatory and data with missing fields will also be imported.

Procedure and planning

Process view from the customer

1. The customer lears about he file format and possibilities
2. The customer clean the data
3. No later than **two weeks before milestone J**, the customer gives the data in the SecuTix format to the project leader
4. No later than **one week before milestone,** the data are imported into pre production environment (pre condition: The copy of data Institution and basic configuration) from prod – to preprod is done before.
5. The customer validate the data import in pre-production
6. Optionally, to import recent data, the customer has the possibility to give a second full data extraction **at J-1** in the same format than the first data extraction.

7. **at J** the data are imported in prod

Complete process

1. At the internal project kick-off, the project leader announces which data will be migrate (Individuals contact, structures, selling history as indicators)
2. The team leader transmit the documents (in service catalog) to the customer
3. The customer gives the data in the SecuTix format to the project leader
4. No later than **two weeks before milestone J**, the project leader creates a kayako data import with the data
5. If the customer is not able to give the data in the SecuTix format, The customer delivers his format and a special price is communicated to the customer
6. VN verify the data and submit to ADI the data transformation foreseen during an import kick-off organized between VN and ADI. ADI validates the foreseen transformations.
7. VN transforms the data by scripts or excel formulas. There is no individual modification. Every modification is reproducible with the scripts or excel formulas. Only entire columns are modify. No individual modification is done on a line
8. VN imports the data in a development environment to validate the import process. VN correct the scripts and formulas to solve the imports problems.
9. The quality gate in VN verify the log file and the protocol used (scripts and excel formulas applied to transform the data) Actions are taken in VN if corrections are necessary
10. No later than **one week before milestone,** VN give back the data correctly formatted to ADI. VN delivers also the Log file and the protocol used with the scripts and excel formulas applied to transform the data)
11. The data are imported into pre production environment (pre condition: The copy of data Institution and basic configuration) from prod – to preprod is done before.
12. The customer validate the data import in pre-production
13. Optionally, to import recent data, the customer has the possibility to give a second full data extraction **at J-1** in the same format than the first data extraction. VN execute the same scripts on the data.
14. ADI imports the data in production
15. ADI gives to VN the list of non-imported data as a log file
16. VN update the kayako with the list of non-imported data (Log file), set the kayako to "final validation" and set the owner to the project leader
17. The project leader validates the import, transmits to the customer and set the kayako to "solved".

Deduplicate contacts

Write how to do

Prepare your data to be imported

To prepare a contact data import please follow the instructions on these pages: :

*   To create new contacts, go to Contact creation.
*   To update existing contacts, go to Contact update
*   To invalidate existing contacts, without loosing information, go to Invalidate contact
*   To delete existing contacts, go to Delete contact or Erase contact information
*   To anonymize contacts, go to Anonymize contact
*   To qualify our contacts, go to Define criteria's for the contacts)
*   Qualify our structures: define type of structure, go to Define type of structure

Special services: Import from non SecuTix formed data

We accept the following data format to be imported.

*   CSV not SecuTix formatted
*   Excel
*   Rodrigue database dump,
*   SecuTix 1
*   Any Oracle, SQL Server, MySql, Postgresql, Filemaker, Access database

We analyze the provided data and propose an action plan an a commercial proposal to import this data.