Contact import Format (Extended)

File format for contacts

The generic file format is described in [Generic file format (Extended)](). This documents describes all available import fields.

In general:

- Field with empty data mean "ignore this field".
- Put value '=' will remove the current value in system.
- Field with data will be imported.

A contact can be Individual or Structure so for Contact **creation** case: At least FIRSTNAME, LASTNAME or STRUCT_NAME must have data.

> ⚠️
> - If first name/ last name is filled and structure name is blank Individual will be created. (1)
> - If structure name is filled and first name + last name is blank Structure will be created. (2)
> - If structure name and first name/ last name are filled Structure + Relay will be created. (3)
>   - Address applies to both structure and relay.
>   - Communication mean (Phone/ Email...) information on contact applies to both relay and structure.
>   - Authorization only applies to relay.
>   - Contact criterion: Depends on contact type. If contact type is Structure, then applies to Structure only. If contact type is Both/ Individual, then applies to Relay only.
>   *Comparing 2 records which have the official name filled (can be (2) or (3)), based on structure information (official_name, address_name1, address_name2) + Address information (line1, line2, line3, zipcode, town, town_complement, country)*
>   *Decide if the same structure or different structures.*
>   *If relay has different address with structure, create a new data file with the operation "UPDATE" in order to update the address for relay.*
>   *Same rule with Communication mean (Phone/ Email...)*

In case you want to associate a contact to a criteria or structure type. Follow these links: [Define criteria's for the contacts]() and [Define type of structure]() to create the records.

Examples

File	Modified
[Microsoft Excel Sheet contact criteria import template.xls]()	Jun 21, 2019 by LBU
[Microsoft Excel Sheet structure types template.xls]()	Jun 21, 2019 by LBU
[PNG File image2023-7-20_11-1-3.png]()	Jul 20, 2023 by buih [X]
[Microsoft Excel Spreadsheet Contact import template full.xlsx]()	Feb 06, 2024 by rks

[Download All]()

Global fields

Field code	Field type	Mandatory	Description
INSTITUTION	Text 15	Yes	Institution code owning the data to be imported.
ORGANIZATION	Text 8	Yes	Organization owning the data to be imported.
		Default: *	A « * » indicates that all organizations of the given institution are concerned. This is the default value.

OPERATION	Enum	Yes	Operation to be executed INSERT : insert the row as a new contact UPDATE : update the contact. Can be used to link criterion to contact. UPDATEACT: update the contact and reactivate it if needed. DELETE: Applicable to all contacts. - Delete the contact address, communication mean - For authorization and criterion value. Only delete the value that specified in excel file. - The email will be empty and contact can't be login to ticketshop anymore. - This action is irreversible. INVALIDATE: Applicable to contact which has no sales. - Just mark contact as invalid with reason: ACCOUNT_DELETED. - All other information are in tact (not removed). ANONYMIZE: Applicable to all contacts (even if it has sales). - All contact information is deleted. Contact name is changed in to 'XXXXXXXX'. - Set contact as ACCOUNT_DELETED and remark contact with 'Contact anonymized'. - The contact's sales information are in tact (not removed). - This action is irreversible. DROP : Should only be used for mis-import. Applicable to contact that imported and has no modified since then. - Drop the contact and all its information. - The contact is not dropped if it is used in existing sales. CONFIG: Configuration line for admin numbers and criteria. - If the codes are defined on this row, then the fields can contain only the value instead of the CodeValue. - The configuration remains valid until a new configuration line - Initially, no codes are defined, forcing the CodeValue format.		

Contact

Field code	Field type	Mandatory	Description
CONTACT_NR	Text 20	The field CONTACT_NR is mandatory for all OPERATION that is not INSERT.	Contact number. If your contact numbers have leading zeros, they must also be given, as they will be kept; the contact number is stored as a text. To be able to import existing contact numbers, the sequence for contact numbers must be adapted to generate numbers high than the highest imported contact number so that new contacts do not get an existing value. This is to be handled outside the import file.
TITLE	Text 200		Data will be imported if value is defined. Complete list for a specific institution can be found in screen Institution context Initialization List of Values Individual Title. Standard values are: MR, MRS, MISS, MR_AND_MRS, UNDEFINED.
LETTER_SALUTATION	Text 200		If value is empty, these fields will be interpolated from the TITLE field, according to the language of the individual. Ex: if TITLE = 'MR'
ADDR_SALUTATION	Text 200		ADDR_SALUTATION = 'Dear Sir' LETTER_SALUTATION = 'Mr'.
FUNCTION	Text 1000		The function of the contact (Head of operations, Chairman, ...)
REMARK	Text 2000		Free remark. Adding two pipes « || » at the beginning will add the text to an existing remark instead of overwriting it.

Individual

Field code	Field type	Mandatory	Description
FIRSTNAME	Text 100		First name
LASTNAME	Text 100		Last name
BIRTHDATE	Date		Birth date

Field code	Field type	Mandatory	Description
PREF_LANG	Code		Preferred language. Use the 2 lettre ISO code. Examples: en, fr, es, it, ...

Structure

Field code	Field type	Mandatory	Description
OFFICIAL_NAME	Text 100		Official name of the structure. The name will be truncated if it is too long.
ADDRESS_NAME1	Text 38		Name of the structure for the adresse. If it is empty, it is taken from the official name
ADDRESS_NAME2	Text 38		If it is too long, it is truncated.
STRUCT_TYPE	Code		The type of the structure. The code must be defined as described in Define type of structure
COMMUNITY_TYPE	Code		The code of the community type. If it is left empty, then the structure isn't member of any community.
ADMIN_NUMBER	CodeValue		Administrative number, for example a SIRET number. Only one number can be given here, but subsequent updates of the contact may help adding several numbers. On the CONFIG row, the user can define the default code. Example
NB_EMPLOYEES	Number		
WEB_SITE	Text 255		URL to the structure's website. It must contain the http:// prefix.

For ADMIN_NUMBER example:

Field value	Comment
SIRET=404 833 048 00022	The SIRET number is 404 833 048 00022
404 833 048 00022	SIRET must have been defined in a CONFIG row

Address

Field code	Field type	Mandatory	Description
ADDR_TYPE	Text 3		M: Main address. S: Shipment address. B: Billing address. Ex: M or B or S or MB or MBS, etc... Leave empty --> that address use for 3 types.
LINE1	Text 100		Address lines.
LINE2	Text 100		
LINE3	Text 100		
ZIPCODE	Text 10		
TOWN	Text 100		Some customer use TOWN_COMPLEMENT please note:
TOWN_COMPLEMENT	Text 100		length of TOWN + length of TOWN_COMPLEMENT < Text 100 characters
COUNTRY	Code		Country code using the ISO codes. Example: FR, ES, EN, GB (and not UK), ... Full name of the country can also be given. They should be written exactly (spaces,hyphens, ...) as they are defined in SecuTix. By default, the country of the institution is used.
DEPARTMENT	Code		List of departments can be provided by SecuTix (internal doc)

Communication means

Field code	Field type	Mandatory	Description
TELEPHO NE	Text 15		Landline phone number. Following formats will be recognized. These examples assume country FR (country of the address, or by default the country of the institution). The initial << + >> sign will be recognized as well as 00. The country prefix can be forced if it entered in parenthesis at the beginning. All other non digit signs are ignored. The national prefix (0 for CH, FR, 1 for US, 9 for ES, etc. see COUNTRY table) will be automatically removed in the database if present in the input number. Examples _see table below_

Input country	Input number	Stored as	Remark
FR	01 40 15 80 00	33 / 140158000	The leading 0 (national prefix) has been removed for France
FR	1 40 15 80 00	33 / 140158000	
FR	0041 21 613 21 11	33 / 041216132111	Country prefix (41 but looking for 33) could not be recognized One leading 0 (national prefix) has been removed for France
CH	0041 21 613 21 11 +41 21 613 21 11	41 / 216132111	Country prefix could be recognized
FR	(41) 216132111 (41) 0216132111	41 / 216132111	This format allows to force the country code. This is the preferred format for import, as it lets you choose the country prefix independently from the country of residence.
FR	01 SVP 77 77	017777	

Field code	Field type	Mandatory	Description
FAX	Text 15		Fax number. Same rules as for PHONE.
CELLPHO NE	Text 15		Mobile phone. Same rules as for PHONE.
EMAIL1	Text 250		Will be used as username for ticket shop login. If email does already exist in the database, the email is imported for the contact but can't be used to login. There no possibility to import a list of passwords. Each new contact will need to request a password change (click on _Have you forgotten your password ?_) The email validated by regular expression: ^[0-9a-z+\$_-]+(\.[0-9a-z+\$_-]+)*@[0-9a-z+_-]+(\.[0-9a-z+_-]+)+$
EMAIL2	Text 250		Alternative email address. Cannot be used for login.
EMAIL3	Text 250		Alternative email address. Cannot be used for login.

Authorization

Field code	Field type	Mandatory	Description
AUTH_CNIL_O	Boolean		Accept communications from institution
AUTH_PARTNER	Boolean		Accept communications from partners
AUTH_CNIL_T	Boolean		Accept transmission of electronic coordinates to third parties
AUTH_SMS_MMS	Boolean		Accept SMS or MMS from institution
AUTH_LETTER	Boolean		Accept letter from institution
AUTH_PHONE	Boolean		Accept phone from institution
AUTH_EMAIL	Boolean		Accept email from institution

Criterion

Field code	Field type	Mandatory	Description
CRIT01	CodeValue		The code must be created as described in Define criteria's for the contacts.
...			- Several values can be given. They need to be separated by pipes. - On the CONFIG row, the user can define the default code. Examples:
CRIT50	CodeValue		

Field value	Comment
PREFCOL=Red	The preferred color is Red only
PREFCOL=Red|Green	The preferred color is Red and Green
Red|Green	PREFCOL must have been defined in a CONFIG row
PREFCOL=Red PREFCOL=Green	This is equivalent to PREFCOL=Red|Green, but using two CRIT columns.

File format for contacts

The generic file format is described in Generic file format (Extended). This documents describes all available import fields.

In general:

- Field with empty data mean "ignore this field".
- Put value '=' will remove the current value in system.
- Field with data will be imported.

A contact can be Individual or Structure so for Contact **creation** case: At least FIRSTNAME, LASTNAME or STRUCT_NAME must have data.

In case you want to associate a contact to a criteria or structure type. Follow these links: Define criteria's for the contacts and Define type of structure to create the records.

Examples

File	Modified
Microsoft Excel Sheet contact criteria import template.xls	Jun 21, 2019 by LBU
Microsoft Excel Sheet structure types template.xls	Jun 21, 2019 by LBU
PNG File image2023-7-20_11-1-3.png	Jul 20, 2023 by buih [X]
Microsoft Excel Spreadsheet Contact import template full.xlsx	Feb 06, 2024 by rks

Download All

Global fields

Field code	Field type	Mandatory	Description
INSTITUTION	Text 15	Yes	Institution code owning the data to be imported.
ORGANIZATION	Text 8	Yes Default: *	Organization owning the data to be imported. A « * » indicates that all organizations of the given institution are concerned. This is the default value.

OPERATION	Enum	Yes	Operation to be executed INSERT : insert the row as a new contact UPDATE : update the contact. Can be used to link criterion to contact. UPDATEACT: update the contact and reactivate it if needed. DELETE: Applicable to all contacts. - Delete the contact address, communication mean - For authorization and criterion value. Only delete the value that specified in excel file. - The email will be empty and contact can't be login to ticketshop anymore. - This action is irreversible. INVALIDATE: Applicable to contact which has no sales. - Just mark contact as invalid with reason: ACCOUNT_DELETED. - All other information are in tact (not removed). ANONYMIZE: Applicable to all contacts (even if it has sales). - All contact information is deleted. Contact name is changed in to 'XXXXXXXX'. - Set contact as ACCOUNT_DELETED and remark contact with 'Contact anonymized'. - The contact's sales information are in tact (not removed). - This action is irreversible. DROP : Should only be used for mis-import. Applicable to contact that imported and has no modified since then. - Drop the contact and all its information. - The contact is not dropped if it is used in existing sales. CONFIG: Configuration line for admin numbers and criteria. - If the codes are defined on this row, then the fields can contain only the value instead of the CodeValue. - The configuration remains valid until a new configuration line - Initially, no codes are defined, forcing the CodeValue format.		

Contact

Field code	Field type	Mandatory	Description
CONTACT_NR	Text 20	The field CONTACT_NR is mandatory for all OPERATION that is not INSERT.	Contact number. If your contact numbers have leading zeros, they must also be given, as they will be kept; the contact number is stored as a text. To be able to import existing contact numbers, the sequence for contact numbers must be adapted to generate numbers high than the highest imported contact number so that new contacts do not get an existing value. This is to be handled outside the import file.
TITLE	Text 200		Data will be imported if value is defined. Complete list for a specific institution can be found in screen Institution context Initialization List of Values Individual Title. Standard values are: MR, MRS, MISS, MR_AND_MRS, UNDEFINED.
LETTER_SALUTATION	Text 200		If value is empty, these fields will be interpolated from the TITLE field, according to the language of the individual. Ex: if TITLE = 'MR'
ADDR_SALUTATION	Text 200		ADDR_SALUTATION = 'Dear Sir' LETTER_SALUTATION = 'Mr'.
FUNCTION	Text 1000		The function of the contact (Head of operations, Chairman, ...)
REMARK	Text 2000		Free remark. Adding two pipes « || » at the beginning will add the text to an existing remark instead of overwriting it.

Individual

Field code	Field type	Mandatory	Description
FIRSTNAME	Text 100		First name
LASTNAME	Text 100		Last name
BIRTHDATE	Date		Birth date

Field code	Field type	Mandatory	Description
PREF_LANG	Code		Preferred language. Use the 2 lettre ISO code. Examples: en, fr, es, it, ...

Structure

Field code	Field type	Mandatory	Description
OFFICIAL_NAME	Text 100		Official name of the structure. The name will be truncated if it is too long.
ADDRESS_NAME1	Text 38		Name of the structure for the adresse If it is empty, it is taken from the official name
ADDRESS_NAME2	Text 38		If it is too long, it is truncated.
STRUCT_TYPE	Code		The type of the structure. The code must be defined as described in Define type of structure
COMMUNITY_TYPE	Code		The code of the community type. If it is left empty, then the structure isn't member of any community.
ADMIN_NUMBER	CodeValue		Administrative number, for example a SIRET number. Only one number can be given here, but subsequent updates of the contact may help adding several numbers. • On the CONFIG row, the user can define the default code. Example <table><tr><td>**Field value**</td><td>**Comment**</td></tr><tr><td>SIRET=404 833 048 00022</td><td>The SIRET number is 404 833 048 00022</td></tr><tr><td>404 833 048 00022</td><td>SIRET must have been defined in a CONFIG row</td></tr></table>
NB_EMPLOYEES	Number		
WEB_SITE	Text 255		URL to the structure's website. It must contain the http:// prefix.

Address

Field code	Field type	Mandatory	Description
ADDR_TYPE	Text 3		M: Main address S: Shipment address B: Billing address Ex: M or B or S or MB or MBS, etc... Leave empty --> that address use for 3 types.
LINE1	Text 100		Address lines.
LINE2	Text 100		
LINE3	Text 100		
ZIPCODE	Text 10		
TOWN	Text 100		Some customer use TOWN_COMPLEMENT please note:
TOWN_COMPLEMENT	Text 100		length of TOWN + length of TOWN_COMPLEMENT < Text 100 characters
COUNTRY	Code		Country code using the ISO codes Example: FR, ES, EN, GB (and not UK), ... Full name of the country can also be given. They should be written exactly (spaces,hyphens, ...) as they are defined in SecuTix. By default, the country of the institution is used.
DEPARTMENT	Code		List of departments can be provided by SecuTix (internal doc)

Communication means

Field code	Field type	Mandatory	Description
TELEPHONE	Text 15		Landline phone number. Following formats will be recognized. These examples assume country FR (country of the address, or by default the country of the institution). The initial << + >> sign will be recognized as well as 00. The country prefix can be forced if it entered in parenthesis at the beginning. All other non digit signs are ignored. The national prefix (0 for CH, FR, 1 for US, 9 for ES, etc. see COUNTRY table) will be automatically removed in the database if present in the input number. Examples <table><tr><th>Input country</th><th>Input number</th><th>Stored as</th><th>Remark</th></tr><tr><td>FR</td><td>01 40 15 80 00</td><td>33 / 140158000</td><td>The leading 0 (national prefix) has been removed for France</td></tr><tr><td>FR</td><td>1 40 15 80 00</td><td>33 / 140158000</td><td></td></tr><tr><td>FR</td><td>0041 21 613 21 11</td><td>33 / 041216132111</td><td>Country prefix (41 but looking for 33) could not be recognized One leading 0 (national prefix) has been removed for France</td></tr><tr><td>CH</td><td>0041 21 613 21 11 +41 21 613 21 11</td><td>41 / 216132111</td><td>Country prefix could be recognized</td></tr><tr><td>FR</td><td>(41) 216132111 (41) 0216132111</td><td>41 / 216132111</td><td>This format allows to force the country code. This is the preferred format for import, as it lets you choose the country prefix independently from the country of residence.</td></tr><tr><td>FR</td><td>01 SVP 77 77</td><td>017777</td><td></td></tr><tr><td></td><td></td><td></td><td></td></tr></table>
FAX	Text 15		Fax number. Same rules as for PHONE.
CELLPHONE	Text 15		Mobile phone. Same rules as for PHONE.
EMAIL1	Text 250		Will be used as username for ticket shop login. If email does already exist in the database, the email is imported for the contact but can't be used to login. There no possibility to import a list of passwords. Each new contact will need to request a password change (click on *Have you forgotten your password ?*) The email validated by regular expression: ^[0-9a-z+\$_-]+(\.[0-9a-z+\$_-]+)*@[0-9a-z+_-]+(\.[0-9a-z+_-]+)+$
EMAIL2	Text 250		Alternative email address. Cannot be used for login.
EMAIL3	Text 250		Alternative email address. Cannot be used for login.

Authorization

Field code	Field type	Mandatory	Description
AUTH_CNIL_O	Boolean		Accept communications from institution
AUTH_PARTNER	Boolean		Accept communications from partners
AUTH_CNIL_T	Boolean		Accept transmission of electronic coordinates to third parties
AUTH_SMS_MMS	Boolean		Accept SMS or MMS from institution
AUTH_LETTER	Boolean		Accept letter from institution
AUTH_PHONE	Boolean		Accept phone from institution
AUTH_EMAIL	Boolean		Accept email from institution

Criterion

Field code	Field type	Mandatory	Description
CRIT01	CodeValue		The code must be created as described in Define criteria's for the contacts.
...			
CRIT50	CodeValue		

The code must be created as described in Define criteria's for the contacts.

- Several values can be given. They need to be separated by pipes.
- On the CONFIG row, the user can define the default code.

Examples:

Field value	Comment
PREFCOL=Red	The preferred color is Red only
PREFCOL=Red|Green	The preferred color is Red and Green
Red|Green	PREFCOL must have been defined in a CONFIG row
PREFCOL=Red PREFCOL=Green	This is equivalent to PREFCOL=Red|Green, but using two CRIT columns.