Workflow Designer

How to create an Import process

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The Workflow Designer contains an Import feature to automatically execute tasks based on an CSV you want to import.

The basic idea behind this feature is to create a system, which could be used to import data in every possible csv-format.
That means the csv don't need to have a default structure like this:
row1 ⇒ record1
row2 ⇒ record2
row3 ⇒ record3

You could create a process which could handle the following structure (Only an example):
row1 ⇒ record1 basic data
row2 ⇒ additional information to record1 (products, ...)
row3 ⇒ additional information to record1
row4 ⇒ record2 basic data
…

You only have to implement this process in the Workflow Designer.

Please following the following steps to use this feature: (You could integrate other tasks, but this must be the basic structure)

You could use the first example as start of the workflow.

- At first you have to create a Workflow with the Trigger "Import Process". This makes the Workflow invisible in situations, different than import.
- After you set the Trigger to "Import Process" you have to reload the Workflow Designer Page, because there will be additional tasks available. (CSV Import)
- you should create and configure a task "*get next line from CSV*"
- create a task "*Import finished*" and connect the bottom output from the next line task. This path will execute if the file was completely imported
- easiest way: create a task "create Record" to create a new Record for every line in CSV. You could configure the "Duplicate check" to automatically search already existing records and update them.

Now you could start the Import from the ListView of the assigned Module. Click on "**start Workflow**" and switch to "**Importer**" to upload your file.

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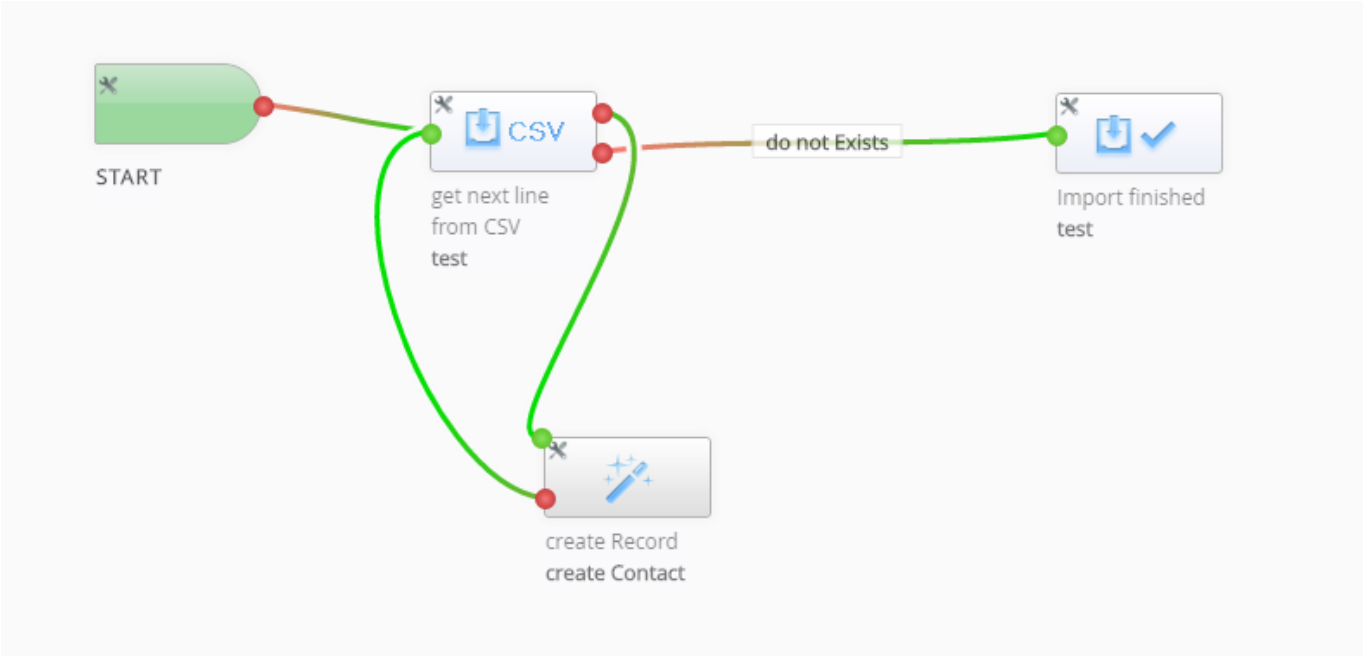
Example 1

This example is a simple one. You could import a CSV file, like the following and search Contacts by first column email. The process update the title for the matched records.

user@domain.com,newTitleValue
user2@domain.com,newTitleValue2

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Example 2



The second example will search Contacts by eMail (first Column).
If the Contact exists, update phone and fax (4th and 5th column).
If not, create Contact and set eMail, firstname, lastname, phone and lastname from CSV.

CSV Example

test1@example.com,Firstname1,lastname1,01235551,01239991
test2@example.com,Firstname2,lastname1,01235552,01239992
test3@example.com,Firstname3,lastname1,01235553,01239993
test4@example.com,Firstname4,lastname1,01235554,01239994
test5@example.com,Firstname5,lastname1,01235555,01239995
test6@example.com,Firstname6,lastname1,01235556,01239996

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test7@example.com,Firstname7,lastname1,01235557,01239997
test8@example.com,Firstname8,lastname1,01235558,01239998
test1@example.com,Firstname11,lastname11,012355511,012399911

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