

# Report Exec Direct Contact Import

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### Where to Begin

This document assumes that the Report Exec Team has already scheduled a task on their server for the automatic import of a contact spreadsheet. The automatic import tool will always look for the same filename, which can be chosen by the agency.

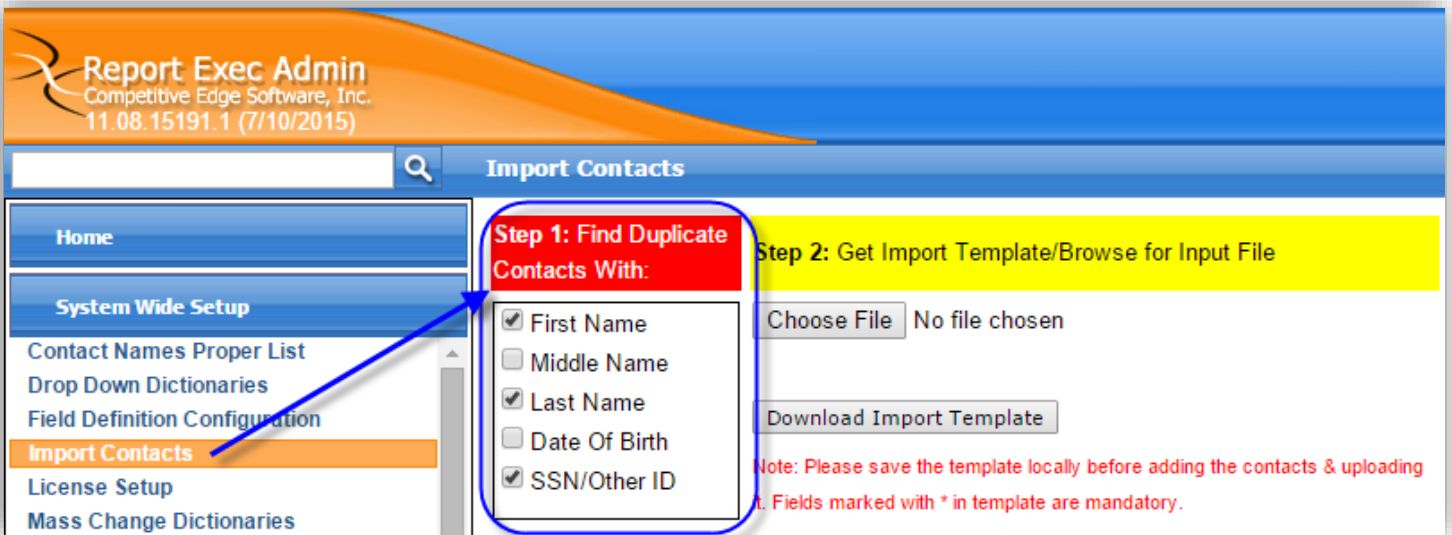
The **Automatic Contact Import** and **Automatic Contact Import w/ Digital Media** features are services that can be purchased by contacting the Sales Team, either by emailing [sales@reportexec.com](mailto:sales@reportexec.com), calling (414) 423-9800 option 1, or by contacting your Sales Representative directly.

### Technical Support

Email [support@reportexec.com](mailto:support@reportexec.com) or call (414) 423-9800 option 2 with questions or issues.

### Report Exec Admin Configuration

The automatic import tool will remember the settings configured for matching duplicates in Report Exec Admin, which is found under **System Wide Setup > Import Contacts**.

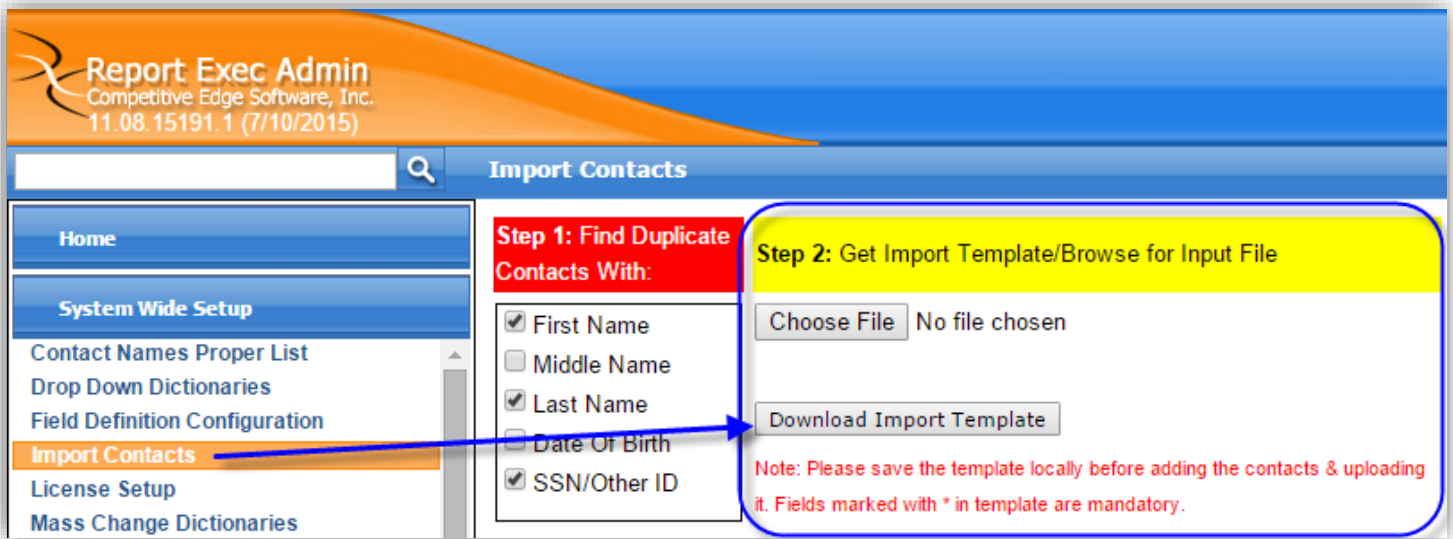


## Importing Contacts with No Digital Media

**Note:** The manual importing of contacts is a feature of Report Exec Admin by default. The **Automatic Contact Import** is an optional service that is enabled after purchase from a member of the [Report Exec Sales Team](#).

### Spreadsheet Template

Agencies will upload their contacts using the Contact Import Template. A new template file can be downloaded from Report Exec Admin, under **System Wide Setup > Import Contacts > Download Import Template**.<sup>1</sup>



### Upload to Report Exec FTP Site

The Report Exec Team will provide the agency with a username and password for Report Exec's FTP site.

➔ <ftp://ftp.reportexec.com>

The automatic import tool will always be looking for a file with a specific name. The name of the file is decided by the agency when the Report Exec Team first sets up the Automatic Contact Import.

Upload a new contact import file to the Report Exec FTP site to import new contacts, or to change old contacts based on the duplicate settings configured in Report Exec Admin.

### When Does the Import Occur?

The time of the contact import is decided upon during the initial setup of the import process. If the time that the contacts are imported needs to be changed, contact Report Exec Technical Support.

### Troubleshooting

See section: [Troubleshooting](#)

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<sup>1</sup> The structure of the template, including column names, must not be deviated from. The file can be saved in either **.xls** or **.csv** format.

## Importing Contacts with Digital Media

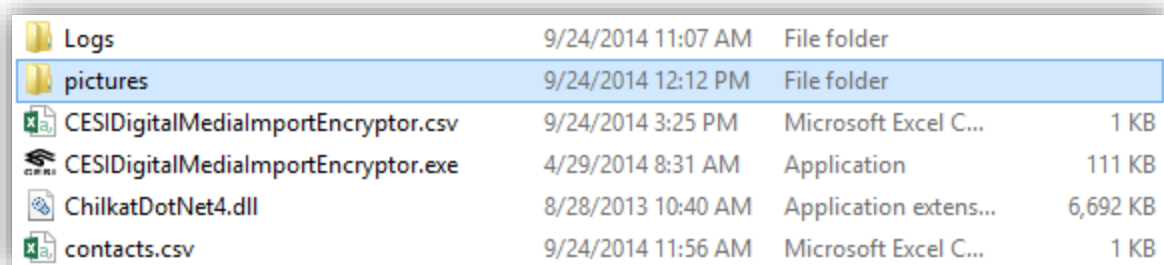
**Note:** The *Automatic Contact Import w/ Digital Media* is completely optional and will only be enabled after purchase from a member of the [Report Exec Sales Team](#). Importing contacts with an image pre-attached is an add-on to the Automatic Contact Import service.

### Spreadsheet Template

Agencies will upload their contacts using a special version of the Contact Import Template. A new template file can be downloaded here: [ContactsTemplateDigitalMedia.xls<sup>2</sup>](#)

### Preparing for Import

1. Download the below import utility files:
  - a. [CESIDigitalMediaImportEncryptor.exe](#)
  - b. [ChilkatDotNet4.dll](#)
2. Create a folder on your local computer with a similar folder structure as seen in the example image in step four below.
3. Move the downloaded import utility files to the local folder as seen in the example image in step four below.
4. The contact images (digital media files) need to be in a separate folder from the three files that were just downloaded. In the example image below, the extra folder is named “pictures” but can be named anything.



Logs	9/24/2014 11:07 AM	File folder	
pictures	9/24/2014 12:12 PM	File folder	
CESIDigitalMediaImportEncryptor.csv	9/24/2014 3:25 PM	Microsoft Excel C...	1 KB
CESIDigitalMediaImportEncryptor.exe	4/29/2014 8:31 AM	Application	111 KB
ChilkatDotNet4.dll	8/28/2013 10:40 AM	Application extens...	6,692 KB
contacts.csv	9/24/2014 11:56 AM	Microsoft Excel C...	1 KB

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<sup>2</sup> The structure of the template, including column names, must not be deviated from. The file can be saved in either **.xls** or **.csv** format. The special version of the Contact Import Template must have an extra column called “**Photo**” that contains the filename and extension (no path) of the original digital media file, i.e. johndoe.jpg.

### Upload to Report Exec FTP Site

The Report Exec Team will provide the agency with a username and password for Report Exec's FTP site.

➔ <ftp://ftp.reportexec.com>

The automatic import tool will always be looking for a file with a specific name. The name of the file is decided by the agency when the Report Exec Team first sets up the Automatic Contact Import.

Upload a new contact import file to the Report Exec FTP site to import new contacts, or to change old contacts based on the duplicate settings configured in Report Exec Admin.

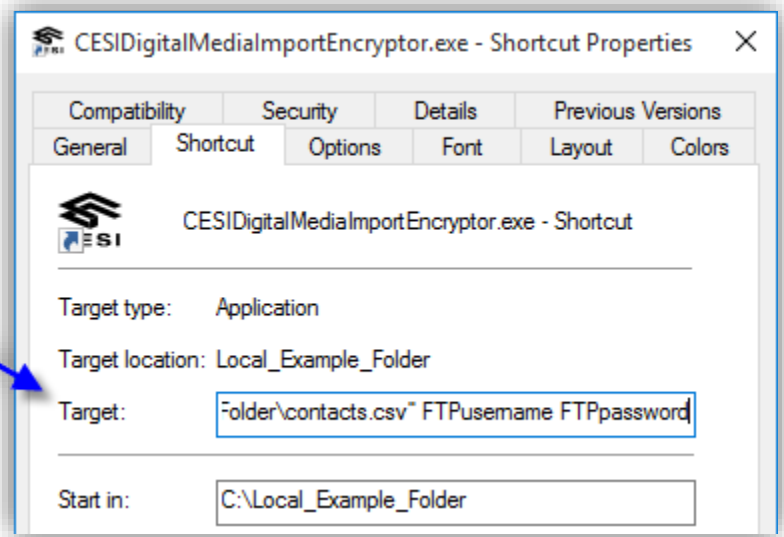
### Upload Digital Media to Report Exec FTP Site

To get the associated Digital Media encrypted and uploaded to the Report Exec FTP site for import, use the following steps:

1. Using one of the methods listed below, run the **CESIDigitalMediaImportEncryptor.exe** utility to pass the path to the source images, the path to the contact import file (the .xls or .csv file), and the FTP username and password.


- ➔ Create a **shortcut** to the **CESIDigitalMediaImportEncryptor.exe** file and update the "Target" path.
- ✓ Modify the "Target" path and point it to the file on your local computer, for example:

```
C:\Local_Example_Folder\CESIDigitalMediaImportE  
ncryptor.exe "C:\Local_Example_Folder\Pictures"  
"C:\Local_Example_Folder\contacts.csv"  
FTPusername FTPpassword
```



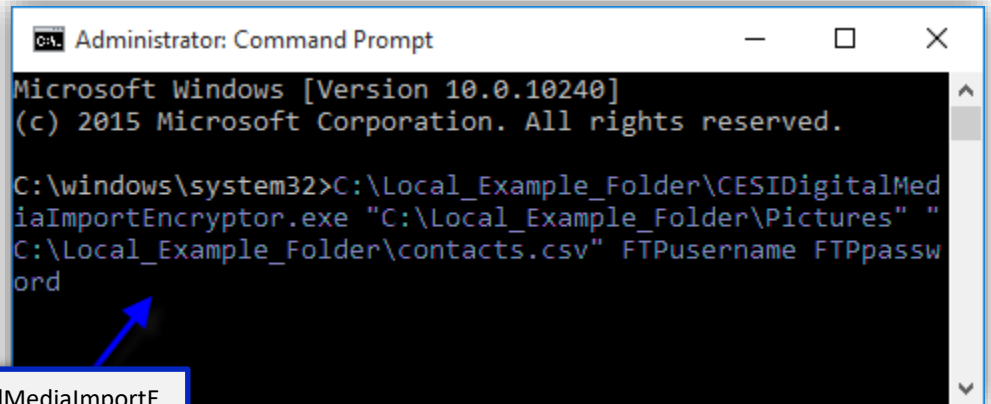
- ✓ Information on how to create a shortcut in Windows can be found here and also elsewhere using an internet search: <http://windows.microsoft.com/en-us/windows/create-delete-shortcut#1TC=windows-7>

- ➔ Create a **batch file** to pass the parameters.

Name	Type	Size
 Example.bat	Windows Batch File	0 KB

- ✓ Information on how to create a batch file in Windows can be found here and also elsewhere using an internet search: <https://technet.microsoft.com/en-us/library/Bb490869.aspx>

- ➔ Execute manually via an **Elevated Command Prompt**.



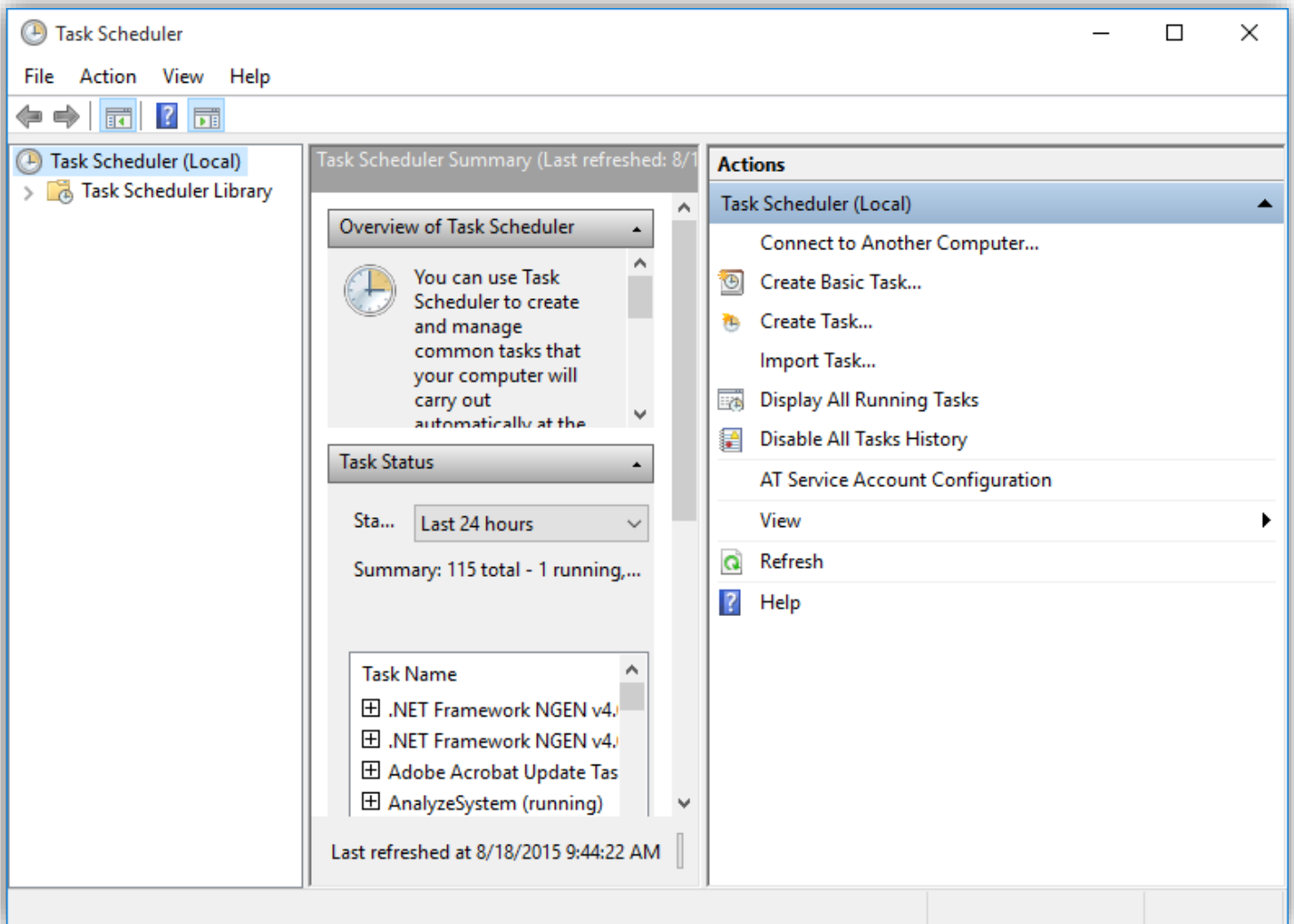
```
Administrator: Command Prompt
Microsoft Windows [Version 10.0.10240]
(c) 2015 Microsoft Corporation. All rights reserved.

C:\windows\system32>C:\Local_Example_Folder\CESIDigitalMediaImportEncryptor.exe "C:\Local_Example_Folder\Pictures" "C:\Local_Example_Folder\contacts.csv" FTPusername FTPpassword
```

C:\Local\_Example\_Folder\CESIDigitalMediaImportEncryptor.exe "C:\Local\_Example\_Folder\Pictures" "C:\Local\_Example\_Folder\contacts.csv" FTPusername FTPpassword

- ✓ Information about the Command Prompt in Windows, including how to elevate the Command Prompt, can be found here, or elsewhere using an internet search: <http://windows.microsoft.com/en-us/windows/command-prompt-faq#1TC=windows-7>

- ➔ Execute via the [Windows Task Scheduler](#).
  - ✓ Use Windows Task Scheduler to schedule the task using the parameters specified previously when creating a [shortcut](#) or using the [Elevated Command Prompt](#).



- ✓ Information about scheduling tasks in Windows can be found here, or elsewhere using an internet search: <http://windows.microsoft.com/en-US/windows/schedule-task#1TC=windows-7>

**Note:** Any changed files in “C:\Local\_Example\_Folder\Pictures” with a file extension of **.jpg, .jpeg, .bmp, .gif, .png, .tif, or .tiff** will be resized to 800x600 and copied to the FTP folder associated with the FTPusername and FTPpassword provided. **If a file is larger than 4MB after resizing, it will not be copied.**

2. A folder named “Logs” will be created in the folder where the **CESIDigitalMediaImportEncryptor.exe** file is running from. The log files can be used to help troubleshoot issues with uploading.
3. Images encrypted and uploaded in this manner will be uploaded to the Report Exec FTP folder mentioned earlier in this document.
4. The Contact Import Spreadsheet will be automatically uploaded to the Report Exec FTP site as it is specified in the parameters.

***When Does the Import Occur?***

The time of the contact import is decided upon during the initial setup of the import process. If the time that the contacts are imported needs to be changed, contact Report Exec Technical Support.

**Troubleshooting**

<Coming soon!>