

FTP import/export

FTP import

If Settings for FTP is configured correctly, Puzzel will look for a new file on Puzzels FTP server periodically (every 15 mins), and if a file is found, then its imported and moved to a sub-folder /AgentAssistContactsImport/Archive

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Home File upload Settings Log Help

Ftp settings

Choose file type and map columns from the list to each field

File type File name

Delimiter Number of columns

File path: /AgentAssistContactsImport

The file has headers in the first row

Configuration

- **File type:** Choose the file extension from the drop-down list of (csv, xlsx, xls).
- **File name:** Enter the filename of the contacts file to be imported (without file extension)
- **Delimiter** must be selected for file type csv
 - ; (semi colon)
 - , (comma)
 - . (period)
 - Tabbed (tab)
- **Sheet** must be selected for file type xls or xlsx
- **Number of columns:** choose the number of columns you have in your contacts file
- **File Path:** Files must be uploaded to /AgentAssistContactsImport
- **Header row:** Check the box if the contact list file contains a header row

Note

Default import mode for FTP uses "Replace and append"

Mapping

To map the columns of the contacts list file to the database fields, click the button Generate columns so that the mapping fields appear.

- For file type csv, the columns are numbered (Column 0, Column 1)
- For file type xls/xlsx the columns are labelled with letters (column A, Column B)

Once the mapping is completed, you can save the settings so that any subsequent import uses the stored settings for automatic processing.

Note

Generate only the number of columns that will be used in the mapping and map all fields to the relevant columns and save the mapping. For FTP import, you can't skip columns. If you only are to import 5 columns, open the file in excel and re-arrange the columns so that the 5 columns you are importing are the first 5.

FTP export

You can now export the contacts in the Contact Management System to a CSV file by clicking on the **initiate new export** button. In a few moments you will be presented with a file that is available for you for a set period of 48 hrs. You will have to click on the file to download it to your local machine.

The screenshot shows the 'Ftp settings' page in the Innovation AgentAssist system. The top navigation bar includes 'Home', 'File upload', 'Settings', 'Log', and 'Help'. The 'Ftp settings' section has a title and a help icon. Below it, there are fields for 'File type' (set to 'CSV'), 'File name' (empty), 'Delimiter' (set to ';'), and 'Number of columns' (empty). The 'File path' is '/AgentAssistContactsImport' and the 'Full replace' option is selected. A checkbox 'The file has headers in the first row' is checked. A 'Generate columns' button is present. Below this is the 'Export contacts' section with an 'Initiate new export' button and a red star icon. At the bottom, there is a table of 'Available files for download'.

Created	File name	Hours available
02.07.2020 11:25:12	efb7a2ee-bab2-4514-a787-f3887c99003d.csv	48