

Import Guide

Ultimate Locator



Importing Records

Guide Released 7/31/2012
for Ultimate Locator v3.5+ series

The purpose of this Import Guide is to give important information and to help define common steps to successfully import a list of store location records into your Ultimate Locator system.



New in v3.5

We are proud to introduce a new feature in the v3.5 release. Ultimate Locator v3.5 has a new process for assigning Categories & Products to your store locations. In the past, you had to import a list of the Category/Product IDs into the Ultimate Locator system, which was separate from the location import file. Now, with the release of v3.5, you will combine Category/Product IDs into your location import file. This allows you to maintain one file, which holds the store's location info (store name and address, etc.) along with Category & Product Assignments. Adding, Maintaining and Updating your locator's data just got easier and more user friendly with the release of this new process.

Simply put, just add any Category ID or Product ID to the last column of your import file and the Import Routine will handle the assignment for you automatically. To add multiple IDs, just separate each with a pipe character "|".

i.e.: entering 1|2|3|4 will assign a store to Category 1, 2, 3 and 4.

Upgrading? If you are upgrading from a previous v3.x system, you can easily export your locations after the upgrade to v3.5 is complete and your exported CSV file will contain your category and product assignments automatically. You won't need to worry about getting a new file formatted correctly because the new export routines will automatically perform this task for you during your first export of your store locations.

See Page 8 of this guide to get full instructions on how to add assignments to your spreadsheet of Store Locations.

Part 1 - Adding Store Location Records

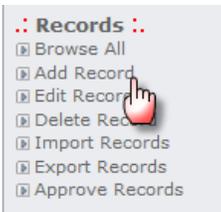
There are two methods you can choose from to add new store location records to your Ultimate Locator system.

1. Manual Entry
2. Bulk Import

Manual Entry

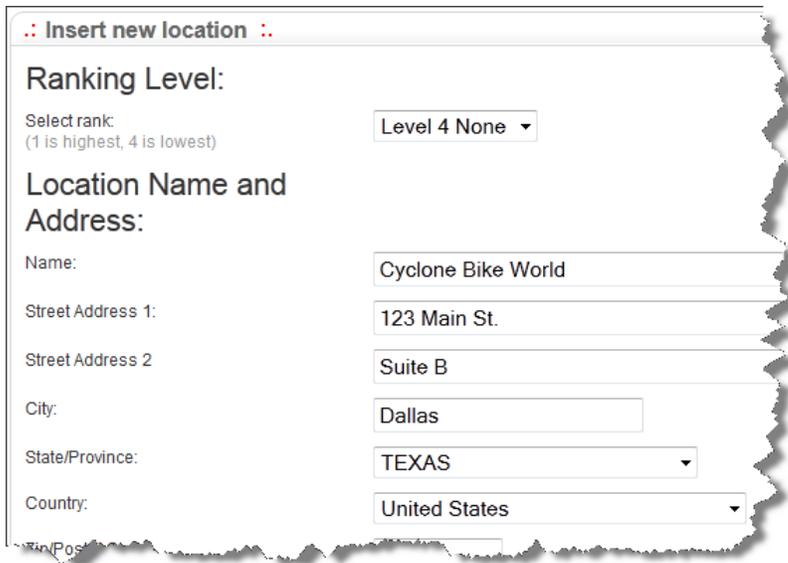
If you have only a few store location records to add to your system, you can easily add them by using the [Add Record](#) tool inside your Ultimate Locator's Admin Panel. Click the '[Add Record](#)' link in the menu to get started.

Screenshot:



You will be presented with a form that you fill out with the details about the store. Fill it out and click 'Save New Record' to add the store to your system.

Screenshot:



Insert new location

Ranking Level:
Select rank: Level 4 None
(1 is highest, 4 is lowest)

Location Name and Address:

Name: Cyclone Bike World

Street Address 1: 123 Main St.

Street Address 2: Suite B

City: Dallas

State/Province: TEXAS

Country: United States

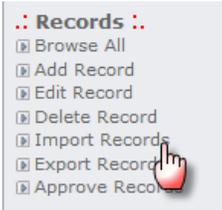
You can repeat this step for each of the new store locations you wish to enter into your system.

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Bulk Import

If you have a large list of store location records to add to your Ultimate Locator system, you can add them in bulk by using the *Import Records* tool inside your Ultimate Locator's Admin Panel. Click the *Import Records* link in the menu to get started.

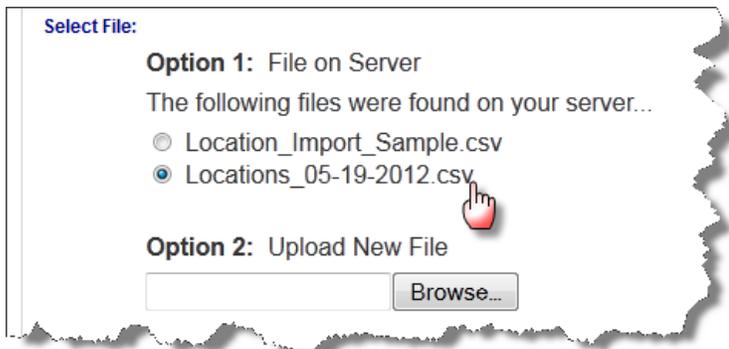
Screenshot:



You will be presented with a screen that gives you a few options on selecting which file you are wanting to use for the import. You can choose a file that is present on your server or you can upload a new file from your local computer.

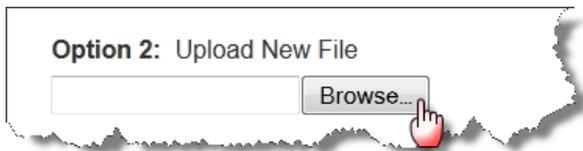
To choose a file already on the web server, just select a file from the list. This list is generated from CSV files that are found inside the /locator/dbbackup folder on your web server.

Screenshot:



To upload a file that you have prepared on your local computer, just click on the 'Browse' button.

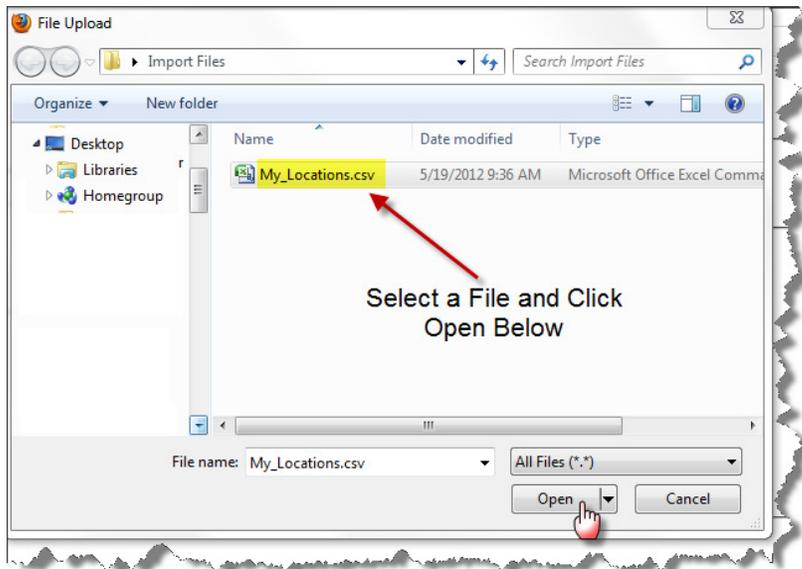
Screenshot:



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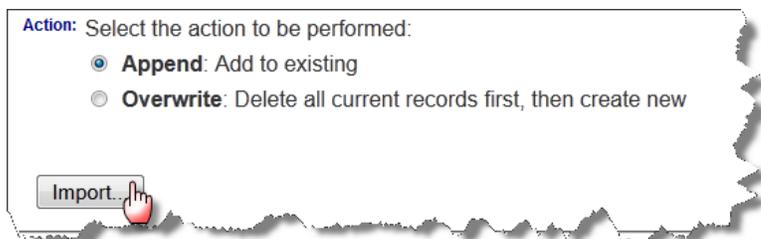
Once the small navigation window appears you can navigate to the CSV file on your computer and select it. Then click on the 'Open' button to select your file.

Screenshot:



Once your file has been successfully selected, you will need to choose 'Append' or 'Overwrite' as your option for the import.

Screenshot:



Append: Using this option will add any records in your import file to the table of existing records. If you are wanting to add X number of records to your locator system, then choose this option. No store location records will be deleted.

Overwrite: Using this option will drop (delete) all existing records in your locator system. After deleting all store location records, it will then import a new list of store records into your locator system with the data inside your import file. Only choose this option if you are sure you want to delete all the stores in your system and start fresh with the store records found in your import file.

TIP: See Part 2 of this guide for details on preparing your CSV file for import.

Part 2 - Prepare Your CSV File for Import

Importing a list of locations into the locator is a simple process. Preparing your list for the correct format can be challenging in some cases. The following steps will help guide you to successfully importing your list of store locations.

In order to successfully import a list of store location records into your locator system, you must prepare a Comma Separated Values (CSV) file. There are a couple of common methods for preparing a CSV file and we will cover the two most common methods here.

1. Create a CSV file from a text document
2. Create a CSV file from a MS Excel spreadsheet

Create a CSV file from a Text Document

Feel free to create a text document from scratch with a text editor. This is a cumbersome method because it is difficult to manage the data and it's not easily readable. To prepare a CSV file from a text document, you first need to create a file on your computer and name it something like 'My_Location.csv'. Open the document in a text editor and start adding your store location data to the file. Here are the formatting rules...

1. One record per line
2. Each record must contain a minimum of 33 fields
3. Each field must be separated by a comma character. ([Comma Delimited](#))
4. Assigning Record IDs are optional, but recommended. Be sure to account for this field with a comma character
5. File must be escaped by line breaks in the windows format. ([Macs be wary of this](#))

In order to import your list into the locator successfully, create a simple CSV text file with one record per line, and each field is separated by a comma. Just like this...

```
1,Store A,123 Main Street,Suite 125,Dallas,TX,US,75378 (plus the other fields)
2,Store B,456 Henderson Dr.,Beverly Hills,CA,US,90210 (plus the other fields)
3,Store C,789 Crown Valley Dr.,South Lima,NY,US,14558 (plus the other fields)
```

See how each record above is on its own line and each field is separated by a comma. **Even if you don't have data to put inside a field, you must account for that field with a comma.**

TIP: Each line (store record) must contain 32 comma delimiter characters, which represent all 33 fields.

Field Names:

```
id,name,address1,address2,city,state,country,zip,telephone,fax,email,website,user1,user2,user3,user4,user5,pref,hide,hits,
aprove,visitorname,visitoremail,visitordate,user6,user7,user8,user9,user10,is_online,image,icon,url_text
```

For Field List and Descriptions, please see the last two pages of this guide

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Create a CSV file from a MS Excel Spreadsheet

By far, the easiest method for maintaining a list of store locations is to utilize a Microsoft Excel Spreadsheet. Excel will keep your records in a list and allow you to edit easily. Once the file is formatted correctly, you can easily 'Save As' a CSV file for easy importing into your Ultimate Locator system.

To start creating your list of stores, we recommend that you download our Excel Starter Templates and add your data to the template. It will make for a quick turnaround on getting your file formatted quickly and easily.



Download Starter Templates: http://www.ultimatelocator.com/v3.5_Starter_Templates.zip

Please download the above Starter Templates ZIP file and extract the files to your computer. You will end up with two MS Excel files on your computer.

1. **v3.5_Starter_Template.xls** - Template for store data
2. **v3.5_Starter_Template_with_Category_Assignments.xls** - Template for store data and category/product assignments

Open the v3.5_Starter_Template.xls file with MS Excel and you can begin adding your store data, one line at a time.

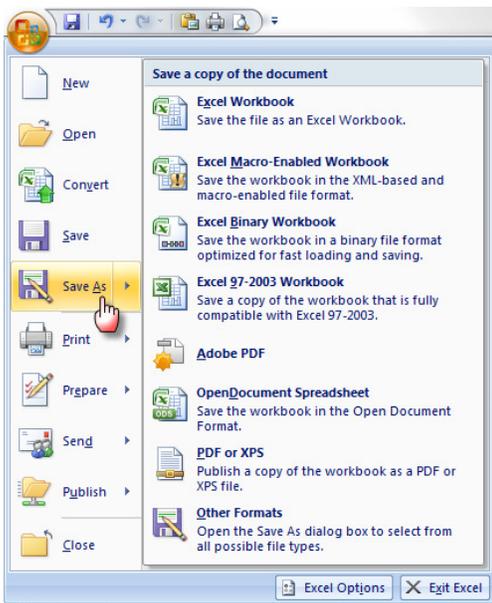
Screenshot:

id	name	address1	address2	city	state	country	zip	telephone	fax	email	website	user1	user2
1	Store A	2520 Queensway	Ste. 22	Prince George	IL	US	60087	(250) 564-7311	(250) 564-7314		www.storeA.com		
2	Store B	Box 969 Hwy 3 East	Bldg. 4	Morden	TX	US	78154	(204) 325-7925	(204) 325-5735		www.storeB.com		
3	Store C	20257 Langley		Langley	PA	US	17325	(604) 530-3620	(604) 530-3622		www.storeC.com		
4	Store D	4510 51st Ave		Edmonton	AL	US	35040	(780) 438-2098	(780) 438-2021		www.storeD.com		
5	Store E	1890 Highway 99N	Ste. 12	Minot	ND	US	58701	(701) 839-8825	(701) 852-8663		www.storeE.com		
6	Store F	4488 Wagon Trail		LaFeria	TX	US	78559	(956) 797-9254	(956) 797-1481		www.storeF.com		
7	Store G	101 Oak Grove Rd		Eugene	OR	US	97402	(541) 689-9284	(541) 689-9645		www.storeG.com		
8	Store H	3452 Route 247		Las Vegas	NV	US	89118	(702) 604-7884	(702) 871-8416		www.storeH.com		
10													

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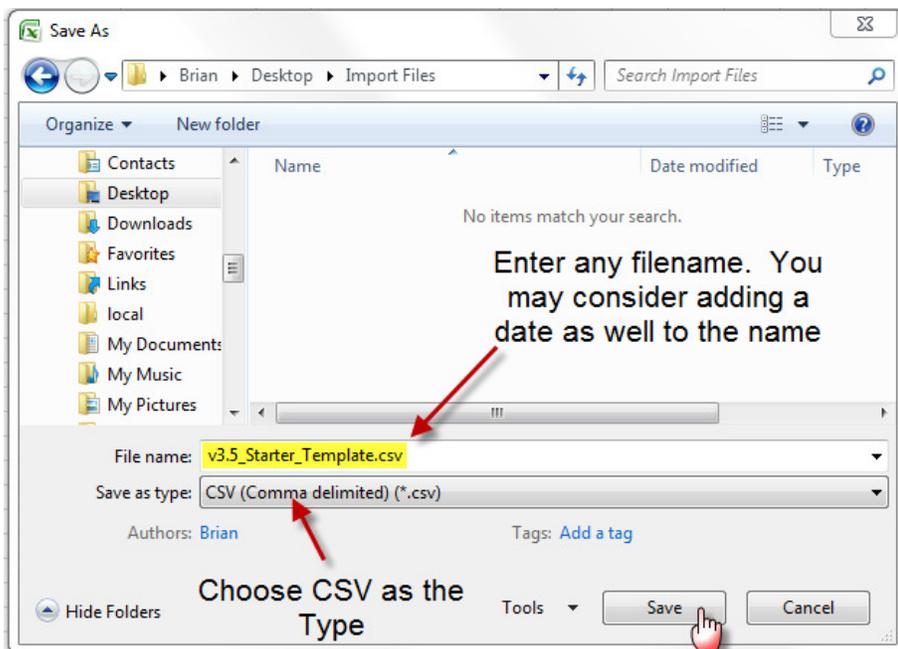
When you have completed adding all your store locations to your Excel Spreadsheet, save your file. Keep the file open because we need to save a copy of this file as a CSV file. To do this, just click on the Office Button  and then click on 'Save As'. (do not choose any item under the list that pops up. Click directly on Save As)

Screenshot:



The 'Save As' dialog window will pop up. Enter any meaningful name for your new CSV file. We also recommend you add the date to your file name like this: My_Locations_5-19-2012.csv You will also need to drop down the list under the 'Save as Type' choice and choose the 'CSV (Comma delimited) (*.csv)' choice. Save the File.

Screenshot:



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Now that you have exported a new CSV file that contains your store locations, it is ready for import. Login to your Ultimate Locator Admin Panel and use the ['Import Records'](#) tool and choose the 'Browse' button to find your new CSV file you saved and import into your locator system.

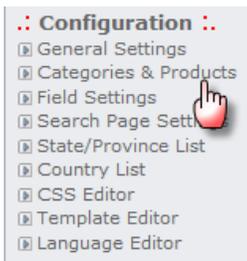
See Part 1 / Bulk Import of this guide for help on how to import successfully inside your Admin Panel.

Add Category & Product Assignments to your Import File

If you are wanting to utilize the Category & Products feature of Ultimate Locator, you can easily do so by creating your Category Names and Product Names inside your Admin Panel. You can use Category and Product Names to help filter search results for your users. Your Ultimate Locator system will generate a list of Categories and/or Products based on the list you create within your system. And your users will be able to choose these filters during a search to narrow down the number of matches that are returned during a search.

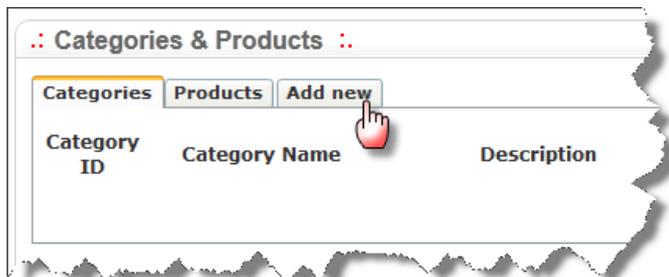
To create new Category Names and Product Names within your system, just use the ['Categories & Products'](#) tool inside your Ultimate Locator's Admin Panel. Click the ['Categories & Products'](#) link in the menu to get started.

Screenshot:



Upon your first entry into the tool, your list will be empty. Click the ['Add New'](#) tab to start adding new Category Names and Product Names to your system.

Screenshot:



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The form presented will allow you to select the Type and enter the Name and Description of the Category or Product you are adding.

Screenshot:

Categories & Products

Categories Products **Add new**

Type: Category

Name: Retailers

Description: Retailers

Insert New Record

Once you have filled out the form, you can click the *'Insert New Record'* button to save your entry. When you have finished adding new Category Names or Product Names into your system, view your list to find out what the assigned ID is for each Category or Product.

Screenshot:

Categories & Products

Categories Products Add new

Category ID	Category Name	Description	Action
4	Boutiques	Boutiques	
2	Distributors	Distributors	
1	Retailers	Retailers	
3	Wholesale	Wholesale	

Record ID

You can switch between Categories and Products by clicking the correct Tab.

At the far left of each new Category or Product Name, you will find the ID. This is the ID used internally within the system to identify the Category Name or Product Name.

You can assign any store location record to one or more categories by entering the Category ID or Product ID into an extra field at the very end of your store locations list. When you add an ID for a Category or Product, the import routine will automatically see your assignment and will instantly assign the store to that particular Category or Product.

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To start creating your list of stores and category/product assignments, we recommend that you download our Excel Starter Templates and add your data to the template. It will make for a quick turnaround on getting your file formatted quickly and easily.



Download Starter Templates: http://www.ultimatelocator.com/v3.5_Starter_Templates.zip

Please download the above Starter Templates ZIP file and extract the files to your computer. You will end up with two MS Excel files on your computer.

3. v3.5_Starter_Template.xls - Template for store data

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Open the v3.5_Starter_Template_with_Category_Assignments.xls file with MS Excel and you can begin adding your store data, one line at a time.

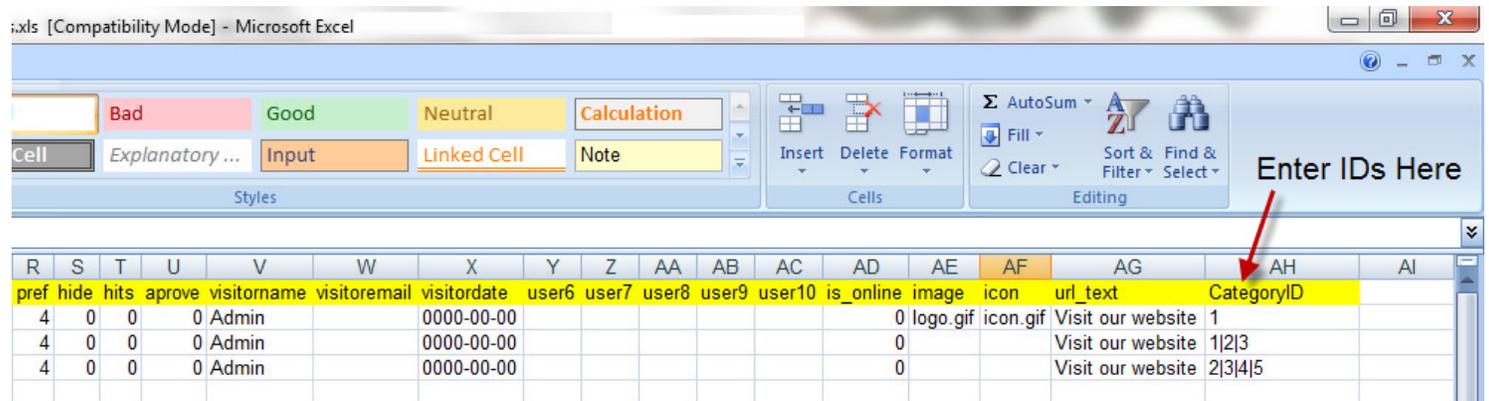
Screenshot:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	id	name	address1	address2	city	state	country	zip	telephone	fax	email	website	user1	user2
2	1	Store A	2520 Queensway	Ste. 22	Prince George	IL	US	60087	(250) 564-7311	(250) 564-7314		www.storeA.com		
3	2	Store B	Box 969 Hwy 3 East	Bldg. 4	Morden	TX	US	78154	(204) 325-7925	(204) 325-5735		www.storeB.com		
4	3	Store C	20257 Langley		Langley	PA	US	17325	(604) 530-3620	(604) 530-3622		www.storeC.com		
5	4	Store D	4510 51st Ave		Edmonton	AL	US	35040	(780) 438-2098	(780) 438-2021		www.storeD.com		
6	5	Store E	1890 Highway 99N	Ste. 12	Minot	ND	US	58701	(701) 839-8825	(701) 852-8663		www.storeE.com		
7	6	Store F	4488 Wagon Trail		LaFeria	TX	US	78559	(956) 797-9254	(956) 797-1481		www.storeF.com		
8	7	Store G	101 Oak Grove Rd		Eugene	OR	US	97402	(541) 689-9284	(541) 689-9645		www.storeG.com		
9	8	Store H	3452 Route 247		Las Vegas	NV	US	89118	(702) 604-7884	(702) 871-8416		www.storeH.com		
10														
11														
12														
13														
14														
15														

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Inside this special Excel Template, we have added a new field (new column) at the very end. You can enter Category IDs and Product IDs in this special field to assign a store record to particular Categories and Products.

Screenshot:



For any store location record inside your list, you can enter one or more IDs in this column to automatically assign that store. The format for entering IDs are as follows:

1. You can enter one ID
2. You can enter multiple IDs, separated by a pipe character. i.e.: 1|2|3|4

Example:

To assign a store to one Category with an ID of **7**, you would enter: **7**

To assign a store to two Categories with IDs **1** and **6**, you would enter: **1|6**

To assign a store to a Category with an ID of **3** and a Product ID of **12**, you would enter: **3|12**

To assign a store to multiple Categories with IDs of **1**, **2** and **3** and Product IDs of **8**, **9** and **10**, you would enter: **1|2|3|8|9|10**

Tip: To add the Categories and Products drop-down list to your searches, you must enable them on the Search Pages. To do this, you must use the '[Search Page Settings](#)' tool to enable Category Searching and or Product Searching for each of your search pages.

Screenshot:



Field List

Field	Type
id	int(10)
name	varchar(200)
address1	varchar(200)
address2	varchar(200)
city	varchar(200)
state	varchar(100)
country	varchar(100)
zip	varchar(10)
telephone	varchar(25)
fax	varchar(25)
email	varchar(200)
website	varchar(200)
user1	text
user2	text
user3	text
user4	text
user5	text
pref	int(3)
hide	int(3)
hits	int(10)
aprove	int(3)
visitorname	varchar(100)
visitoremail	varchar(100)
visitordate	date
user6	text
user7	text
user8	text
user9	text
user10	text
is_online	int(3)
image	varchar(255)
icon	varchar(255)
url_text	varchar(255)

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Fields Descriptions

Name	Description	Example Data	
id	Record ID	122	Can be blank for auto number
name	Location Name	Cycle world	- Required
address1	Address 1	677 Eastchase Pkwy	Optional - But recommended
address2	Address 2	Suite 202	Optional - But recommended
city	City	Dallas	Optional - But recommended
state	State Code	TX	2-Letter Code Optional - But recommended
country	Country Code	US	2-Letter Code Optional - But recommended
zip	Zip code	75202	- Required
telephone	Telephone	214-555-1212	optional
fax	Fax	214-555-3434	optional
email	Email	info@cycles.com	optional
website	Website URL	www.cycles.com	no http:// needed - Optional
user1	User 1 Field	Sale every Wednesday	Anything you want - Optional
user2	User 2 Field		Anything you want - Optional
user3	User 3 Field		Anything you want - Optional
user4	User 4 Field		Anything you want - Optional
user5	User 5 Field		Anything you want - Optional
pref	Rank	2	1 through 4 - Required
hide	Disable Record	0	0=no, 1=yes - Required
hits	No. of Hits	167	Number of hits received, set to 0 first time - Required
approve	Needs Approval	0	0=no, 1=yes - Required
visitortname	Name	Admin	Name of person who submitted the record - Optional
visitoremail	Email	-	Email of person who submitted the record - Optional
visitordate	Date	2007-22-05	Date record was submitted - Optional
user6	User 6 Field		Anything you want - Optional
user7	User 7 Field		Anything you want - Optional
user8	User 8 Field		Anything you want - Optional
user9	User 9 Field		Anything you want - Optional
user10	User 10 Field		Anything you want - Optional
is_online	Online Store	0	0=no, 1=yes - Optional
image	Image	image.gif	image filename - Optional
icon	Icon	icon.gif	icon filename - Optional
url_text	Text for Link	Click to View	Text that gets printed on website link - Optional
category_id	Assignment Ids	1 2 3 4	Category & Product ID Assignments - Optional Field

Troubleshooting

Please visit our eSupport Center for help with Troubleshooting import issues. You will want to visit the v3.5 Importing Issues section for more help...

http://support.ultimatelocator.com/index.php?/default_import/Knowledgebase/List/Index/31/v35-importing-issues

Please visit our eSupport Center at
<http://support.ultimatelocator.com>