laylah

Data import

Imports from Zoho / Cloven

Documentation

Instructions

1. Only **zip** archives smaller than **2GB** are supported.
2. Normally a zoho extraction includes **more zip** and **a csv** called "zoho contacts export XX.csv".
3. For the import to work, you must "zip" the csv file.
4. **Do not** rename any of the files contained in the archives or the import will fail.

Limitations

5. Only the following entities are imported:
    a. Contacts → Personnes
    b. Attachments → Documents
    c. Leads → Personnes
    d. Notes → Commentaires
    e. Tasks → Tâches
    f. Calls → Events
6. Unable to determine whether the contact is a person or an organization, so they are imported as persons.
7. All other files are ignored.
8. Any other column present in the files but not listed in the following tables is ignored.

Imported fields

Contacts

Are imported as <u>person</u>, if first and last name are missing then the <u>entry is ignored</u>.

Zoho	Laylah	Notes
Record Id	ID	Primary identifier
Contact Owner.id	Assigned person	
Contact Owner		
First Name	First Name	
Last Name	Last name	
Contact Name	Complete name	
Salutation	Honorific prefix	
Date of Birth	Date of Birth	
Email	Email (personal)	
Alternate Email	Email (other)	
Phone	Phone (home)	
Work Phone	Phone (work)	
Mobile	Phone (mobile)	
Mailing City	Address (maison)	
Mailing Country		
Mailing State		
Mailing Street		
Mailing Zip		
Other City	Address (autre)	
Other Country		
Other State		
Other Street		
Other Zip		
Company	Employer	
Hobbies/Interests	Interests	
Client Occupation	Job title	
Will	Will	If yes.

Power of Attorney	Power of attorney	If yes.
Income	Income (Salary)	If the monetary value can be interpreted. Empty otherwise.
Misc	Note (pin)	Added to notes.
Description	Note (pin)	Added to notes.
Insurance	Note (pin)	Added to notes.
Insurance Policies	Note (pin)	Added to notes.
Insurance Policies contd	Note (pin)	Added to notes.
Trusted Contact	Note (pin)	Added to notes.
Kids	Note (pin)	Added to notes.

Attachments

Are imported as documents and linked to contacts.

Zoho	Laylah	Notes
Record Id	ID	Primary identifier
File Name	File Name	
Parent.id	Link to the person	

Calls

Are imported as events and linked to contacts.

Zoho	Laylah	Notes
Record Id	ID	Primary identifier
Subject		
Description		
Contact Name.id	Link to the person	
Call Start Time	Start date	
Call Duration (in seconds)	-	Used to calculate the end date.

Notes

Are imported as comments and linked to contacts.

Zoho	Laylah	Notes
Record Id	ID	Primary identifier

Note Title	Content	
Note Content	Content	
Parent.id	Link to the person	
Parent Id.Module	-	Used to determine whether the note should be imported (If Contacts, Leads) ignored if other value.
Created Time	Creation date	

Tasks

Are imported as comments and linked to contacts.

Zoho	Laylah	Notes
Record Id	ID	Primary identifier
Task Owner.id	Assignment	
Subject	Sommary	
Due Date	Date due	
Contact Name.id	Link to the person	
Status	-	If COmpleted and Closed Time is not empty, then the task is indicated as completed at this date.
Created Time	Creation date	
Description	Description	
Closed Time	Date of completion	Used to enter the completion date if "Completed".

Leads

Are imported as persons if missing first and last names then ignored.

Zoho	Laylah	Notes
Record Id	ID	Primary Identifier
Lead Owner.id	Assignment	
First Name	First Name	
Last Name	Last Name	
Full Name	Full Name	
Salutation	Honorific prefix	
Email	Email (personal)	
Secondary Email	Email (other)	
Phone	Phone (home)	

Fax	Phone (fax)	
Mobile	Phone (mobile)	
Website	Link	
Street	Address (home)	
City		
State		
Zip Code		
Country		
Description	Note (pin)	
Annual Revenue	Income	