QUICKSTART

IMPORTING U.S. CUSTOMER OR LOCATION FILES - DATA PREPARATION

- Files must be under 75 MB.

  If your file is larger than 75 MB, consider rolling it up to the ZIP Code level and creating a weight field. The weight field represents the number of records per ZIP Code. We can also help create a file in a smaller file format. Please contact us for details.

- File must contain the following:
  - Address, City, State and ZIP or ZIP+4

    or

  - ZIP or ZIP+4

- While CSV is typically the smallest file size, XLSX format allows for formatting of the ZIP Code field

∗ The field that contains the ZIP Code, including the header, must be formatted as text to maintain any leading zeroes

- Geocoding uses a stepped approach. If a match on Address, City, State is not found, the record will be geocoded using the ZIP or ZIP+4

- Field names are necessary and headers must only be one row and in the 1st row

- Refrain from using symbols (@#$%^&* etc.) or punctuation in column headers or in the data fields

- No leading or trailing spaces in the file name or header fields

- Regular text works best (no formatting or accounting symbols on dollar values)

- No blank row after your header row (first row of data should always be populated with data in each column)

- When geocoding using street address, make sure proper street names are used (see examples below)

- Locations require a Name/Label Field (i.e. Store ID or Store Name)

- Locations require a location type field for mapping (see example below)

Sample file names:

INCORRECT	CORRECT
customer$_retail.csv	customer_dollars_retail.csv
mortgages & loans prospects.csv	mortgages_loans_prospects.csv
␣members2014␣.csv	members2014.csv (no spaces at the beginning of file name or within file name)

Sample address names:

55 York Street	Number proceeding address. Can also use abbreviations ST, AVE, CRT
770-340 Main Ave	Always include a hyphen for addresses with unit/suite numbers, do not use any other symbol
478 12 Ave SW	For numbered streets do not use the ordinal indicator (st, th, rd, nd)

Sample Location file:

*ZIP column must be formatted as text

LocationID	Address	City	State	ZIP	Location Type
AZ001	15602 N 59th Lane	Glendale	AZ	85306	Main
CA001	3 Via Felicia	Rancho Santa Margarita	CA	92688	Competitor A
CT001	210 Capitol Ave	Hartford	CT	06106	Competitor B

Selecting the location type field as the Map Group Field in ENVISION5 allows for unique location symbology on maps. The Map Group Field is also used as the legend entry for the locations.