

IMPORTING CUSTOMERS

You can import customer files into ENVISION5. You can upload a file of customers with address information or coordinate information. The process itself does not differ much, other than specifying the fields that contain that information.

There are four steps in the process of importing a customer file:

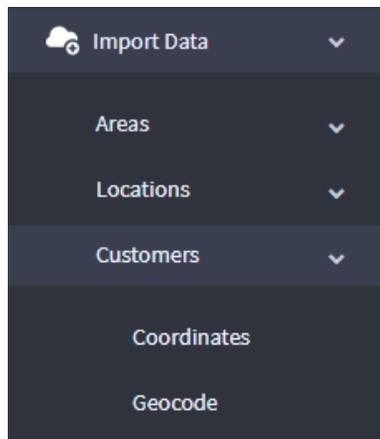
1. Upload the file
2. Specify the file properties
3. Specify the geocode settings
4. Specify any additional fields (optional)

To import a customer file with address information into ENVISION5, the file needs at minimum, either an address, and city/town, and state or a 5 digit ZIP Code for each customer record.

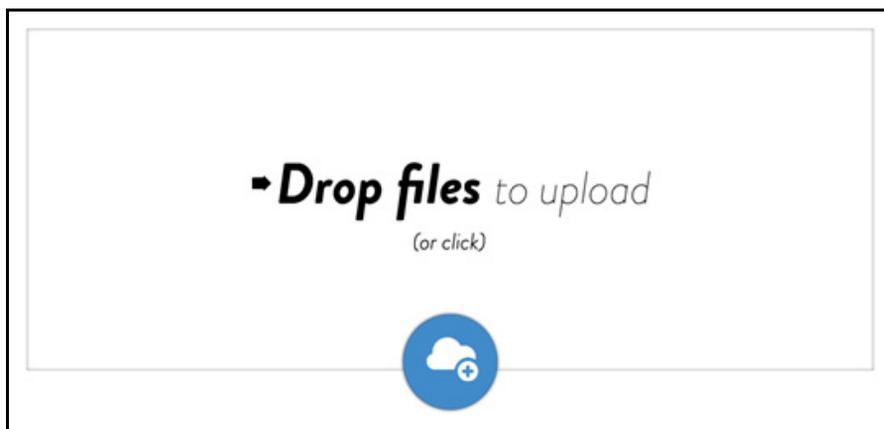
To import a customer file with coordinate information into ENVISION5, the file needs at minimum, both a longitude and latitude coordinate.

1. Upload File

1. On the Side Panel, click **Import Data** and then **Customers** and then either **Coordinates** or **Geocode**, depending on which information you have in your customer file.

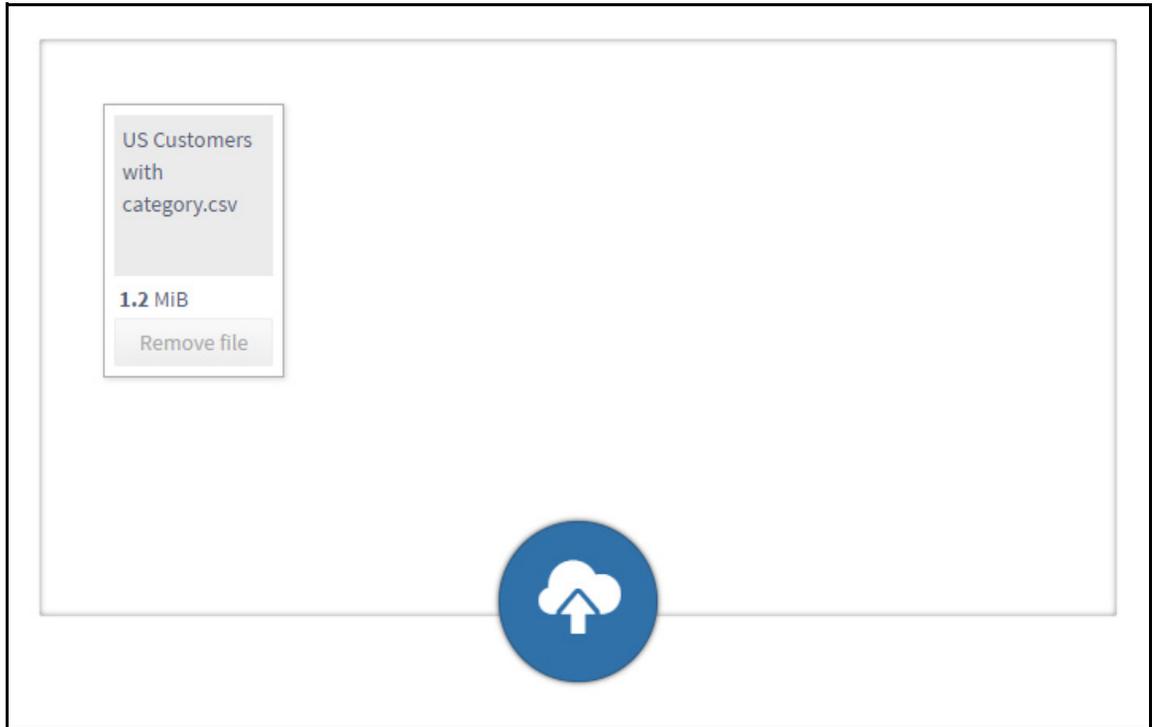


2. Drag and drop your customer file into the upload box, or click the **Add** button to browse for your file.



Once a file has been placed in the box, the **Add** button will change to the **Upload** button.

3. Click the **Upload** button.



2. Properties

The **File Preview** window displays and you can adjust your file properties as required.

The screenshot shows a 'Properties' form with the following sections:

- Dataset Name:** A text input field containing 'US Customers with category'.
- Dataset Description:** A larger text input field with the placeholder text 'Enter Customer File Description'.
- Tags:** An empty text input field.
- Available in all Workspaces:** A toggle switch currently set to 'OFF'.
- Start Date:** A text input field containing 'Start Date'.
- End Date:** A text input field containing 'End Date'.

1. In the **Dataset Name** box, change the default name if required. This is the name that will be seen throughout ENVISION5 on all dashboards and maps.
2. In the **Dataset Description** box, give your file a description. Add anything that will help to further define the customer list. (THIS IS OPTIONAL.)

3. In the **Tags** box, enter any keywords you wish. These are used for better searching. (THIS IS OPTIONAL.)
4. Turn the **Available in all Workspaces** on or off as required.
 - **OFF** means that this file is only available in the current workspace.
 - **ON** means that this file is available in every workspace.
5. Set the **Start Date** and **End Date** as required. They act as tags referring to the vintage of your data. They can also be used to specify when customer records become active and inactive. (THIS IS OPTIONAL.)
6. Click **Next Step**.

3. Geocode Settings

Here you will specify the fields for the geocoding of the customer file, whether it contains the address information or coordinate information. (Both examples are shown below, use the one that is relevant to you.) The File Preview window minimizes, but you can expand it if needed.

3-1. Geocoding a Customer File with Address Information

Geocoding Fields	Record Definitions
Address Field Not selected	Choose a Base Variable Total Households
City Field Not selected	Use Record Count or Record Weight? Record Count
State Field Not selected	
ZIP / ZIP+4 Field Not selected	
Location Id Field Not selected	

3-1-1. Geocoding Fields

Here you will select the fields that will be used to geocode the file.

1. In the **Address Field** list, click the field that contains the customer's address.
2. In the **City Field** list, click the field that contains the customer's city/town.
3. In the **State Field** list, click the field that contains the customer's state.
4. In the **ZIP/ZIP+4 Field** list, click the field that contains the customer's ZIP Code.
5. In the **Location ID Field** list, click the field that you will use to link your customers to a Locations list.

Note: The Location ID field must be identical in both the customer file and the location file.

3-2. Geocoding a Customer File with Coordinate Information

Coordinates	Record Definitions
Latitude (Y) Field <input type="text" value="Not selected"/>	Choose a Base Variable <input type="text" value="Total Population"/>
Longitude (X) Field <input type="text" value="Not selected"/>	Use Record Count or Record Weight? <input type="text" value="Record Count"/>

3-2-1. Coordinates

Here you will select the fields that will be used to geocode the file.

1. In the **Latitude (Y) Field** list, click the field that contains the customer's latitude (or Y) coordinate.

2. In the **Longitude (X) Field** list, click the field that contains the customer's longitude (or X) coordinate.

3-3. Record Definitions

Here you will select the fields that will tell ENVISION5 how your data is set up.

The one thing you will want to consider is:

- Whether to use record count or record weight

3-3-1. Record Count vs. Record Weight

How does ENVISION5 treat the individual records (or rows) in your customer file? Is your data unit record data? Is there one record per customer? If so, then ENVISION5 should count each record as one customer and you will choose **Record Count**.

Is your customer file rolled-up or aggregated at the ZIP Code level? That is, the ZIP Code is listed once and there is a field representing the number of customers at that ZIP Code. Then ENVISION5 should weight the ZIP Code by the number in the weight field and you will choose **Record Weight**.

3. In the **Choose a Base Variable** list, **Total Households** is chosen automatically.
4. In the **Use Record Count or Record Weight** list, click **Record Count** or **Record Weight**.
 - a. If you choose **Record Weight**, in the **Record Weight Field** list, choose the field that contains the number of customers at that ZIP Code.
5. Click **Next Step**.

4. Optional Additional Fields

In this step you can choose to import any additional fields that you may wish to use later in your analysis. If your file includes fields like sales, frequency, store number, tenure, or type,

you may wish to include them here. Selecting the data type for these additional fields is also important, as it will determine how you can filter reports within ENVISION5.

Import Additional Fields		All	OFF
UniqueID	<input type="checkbox"/>	OFF	
City	<input type="checkbox"/>	OFF	
CustomerWeight	<input type="checkbox"/>	OFF	
Member Type	<input checked="" type="checkbox"/>	ON	
	Categorical		▼
Postal Code	<input type="checkbox"/>	OFF	
StoreCode	<input checked="" type="checkbox"/>	ON	
	Text		▼
Dollars	<input checked="" type="checkbox"/>	ON	
	Consumption		▼

4-1. Data Types

- Text- Indicates your field contains text. Allows the following operators in a query:
 - =
 - <>
 - In
 - Not In
 - Starts With
 - Contains
 - Ends With
- Flag- Indicates that your field contains true/false data. Allows the following operators in a query:
 - =
 - <>
- Categorical- Indicates that your field contains items that can be grouped together. When building a query these categories will be pre-populated. Allows the following operators in a query:
 - In
 - Not In

- Consumption- Indicates that your field contains numeric data that can be measured, very often a dollar amount. Allows the following operators in a query:
 - =
 - <>
 - >
 - <
 - >=
 - <=
1. Set any field(s) for import by turning the switch **ON** for that field.
 2. In the list, click the data type for that field.

Import Additional Fields All OFF

State	<input type="checkbox"/> OFF	City	<input type="checkbox"/> OFF
Address	<input type="checkbox"/> OFF	ZipCode	<input type="checkbox"/> OFF
Category	<input checked="" type="checkbox"/> ON		

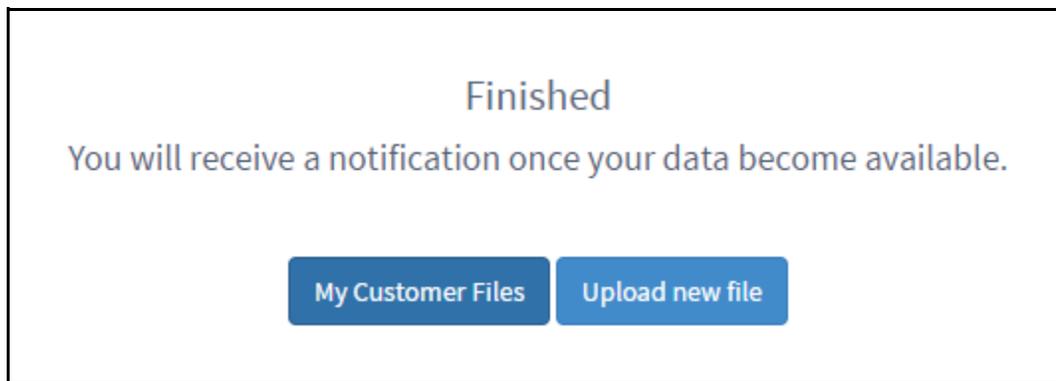
Categorical ▾

3. Click **Next Step**.

Tip: There is no need to select any of the address or geography fields that you selected in previous step. These will already be included.

5. Finished

A message displays indicating that you are finished and that you will receive a notification when the file becomes available for use.



A notification displays in the bottom-left corner of your screen indicating that the data has been submitted for importing. Another one displays indicating that the importing is complete.

1. You can also see the geocoding result in your **Results** list in the side panel.



Your customer file will should appear in the list.

Tip: In the side panel, you can also click **My Data** and then **Customers**.

