CommunityWFM

# Data Import with Excel

For CommunityWFM 5.0+
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3400 Waterview Parkway, Suite 325
Richardson, Texas 75080

phone 877-668-6870
web CommunityWFM.com

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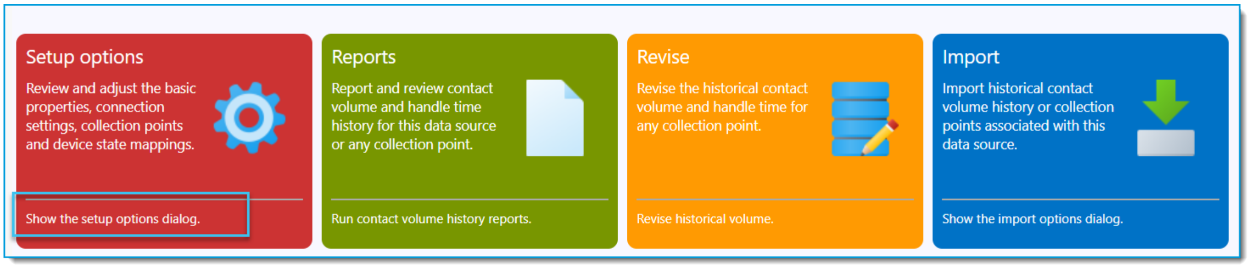
# Excel data import preparation

We recommend downloading the Excel template from the system (see step 1).

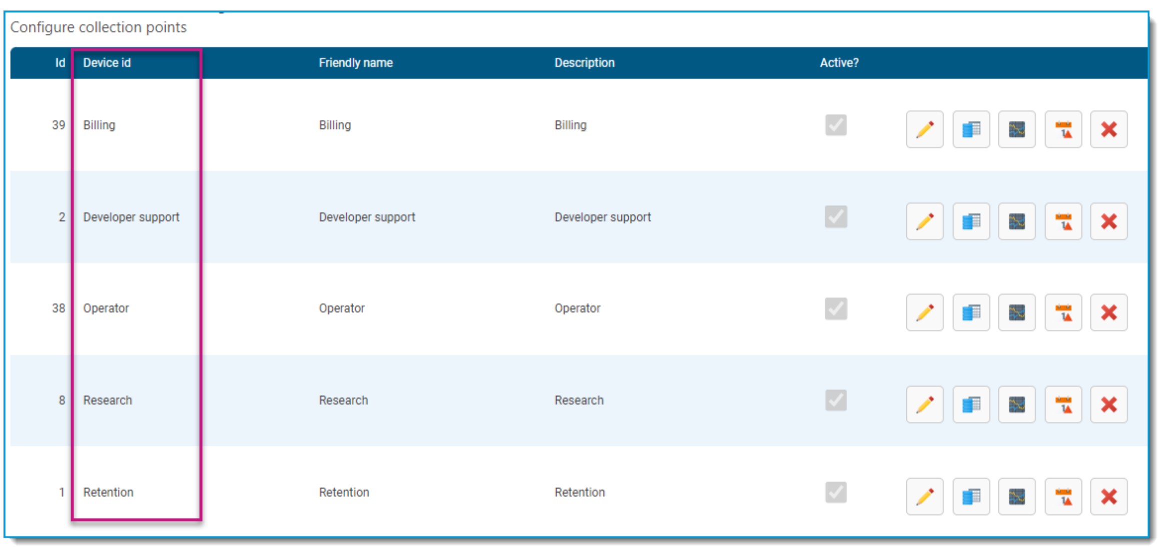
The template includes the required fields and proper formats. Time should be in a 24-hour clock.

| | A | B | C | D | E |
|---|---|---|---|---|---|
| 1 | **Skill Id** | **Time Interval** | **Contacts Offered** | **Contacts Not Handled** | **Total Talk Time** |
| 2 | (device id from data source collection points) | (mm/dd/yyyy hh:mm) | (integer) | (integer) | (seconds) |
| 3 | | | | | |

To find the Skill Id (device id) select *Show the setup options dialog* in the Setup Options tile (Settings > Data sources).




Open *Collection Points* to see the Device id for the data source.



Configure collection points

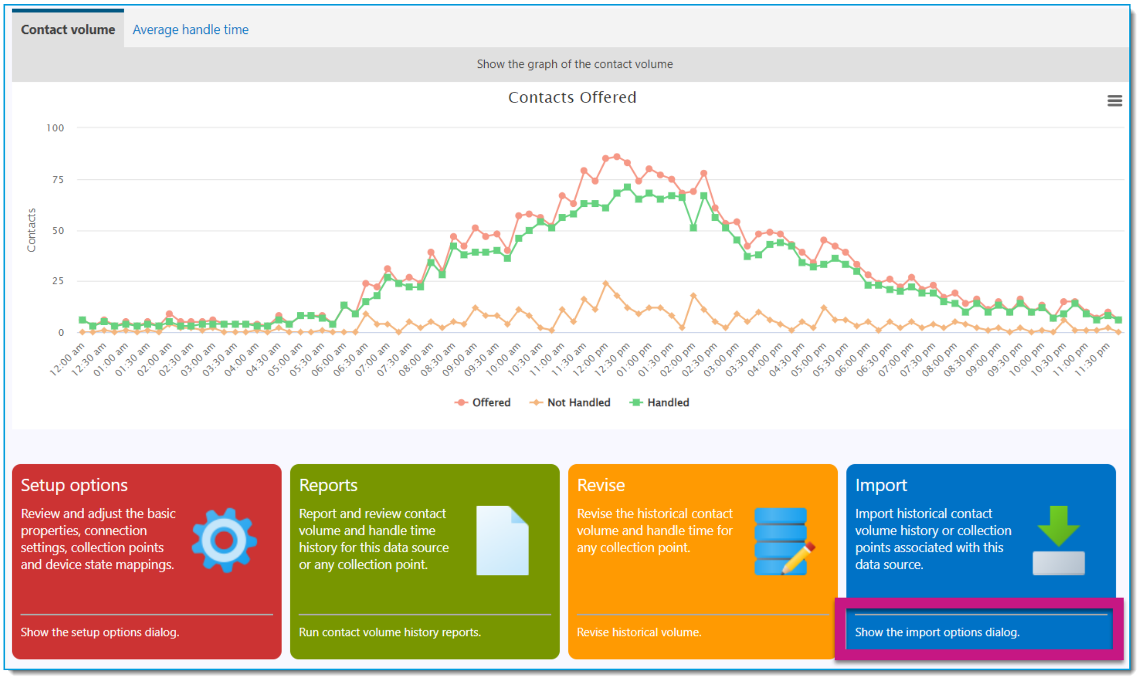
| Id | Device id | Friendly name | Description | Active? |
|---|---|---|---|---|
| 39 | Billing | Billing | Billing | |
| 2 | Developer support | Developer support | Developer support | |
| 38 | Operator | Operator | Operator | |
| 8 | Research | Research | Research | |
| 1 | Retention | Retention | Retention | |

# Import into the data source

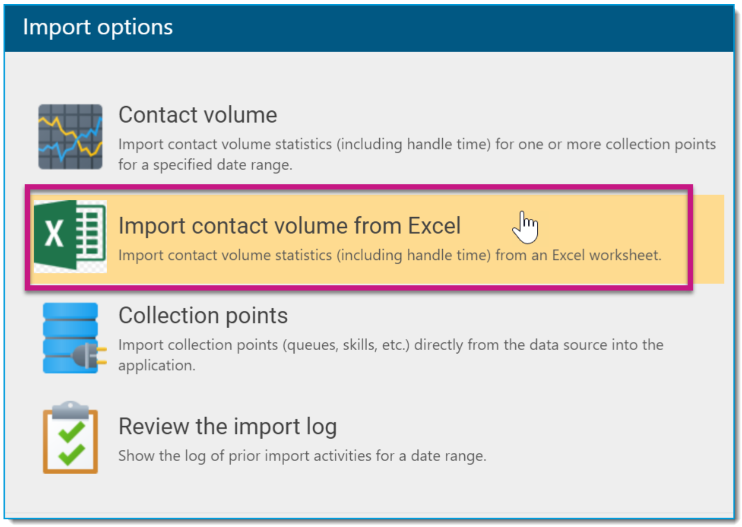
Navigate to Settings > Data sources

Select the data source for your center.

Scroll down to the Import tile and select *Show the import options dialog.*

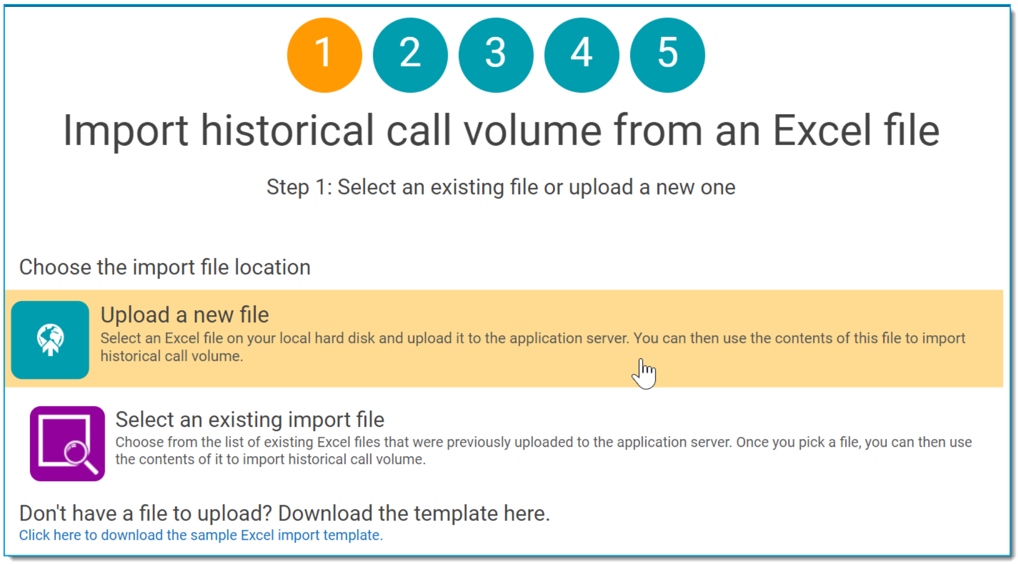



In the pop-up menu select *Import contact volume from Excel.*



## Step 1: Select an existing file or upload a new one

Select whether to *Upload a new file* or *Select an existing import file*. This screen will have slightly different options depending on whether there are previously uploaded files.

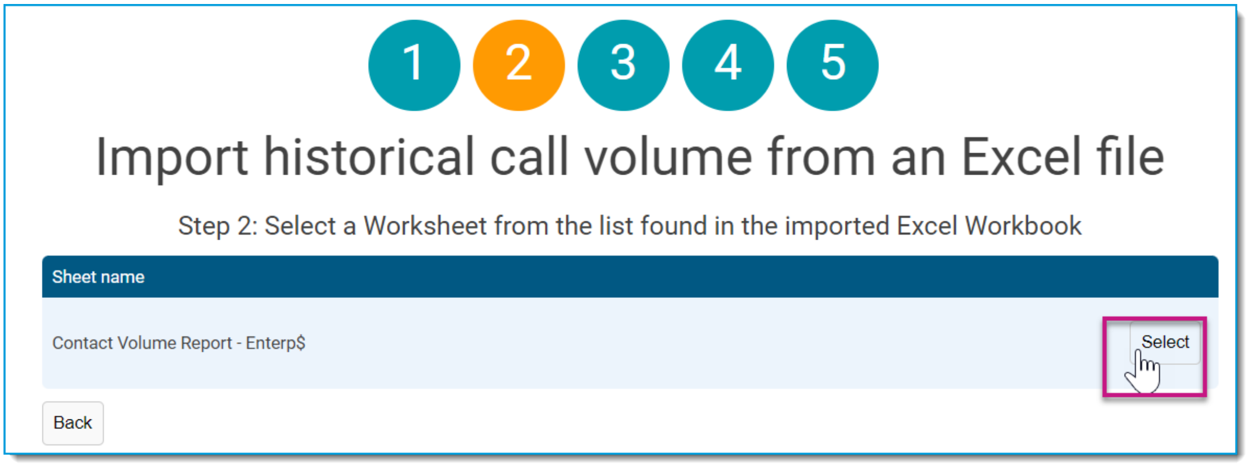



**Note:** The file must not be open when uploading.

Typically, you'll import one skill at a time. There is a row limit of ~5000 when importing.

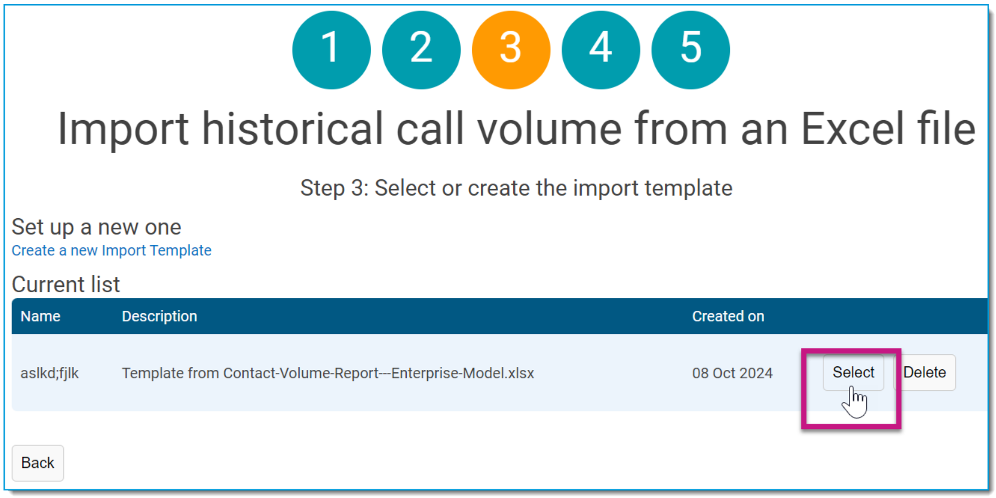
## Step 2: Select the worksheet

Select the worksheet from the uploaded or existing workbook. You may import only one worksheet at a time.



## Step 3: Select or create the import template

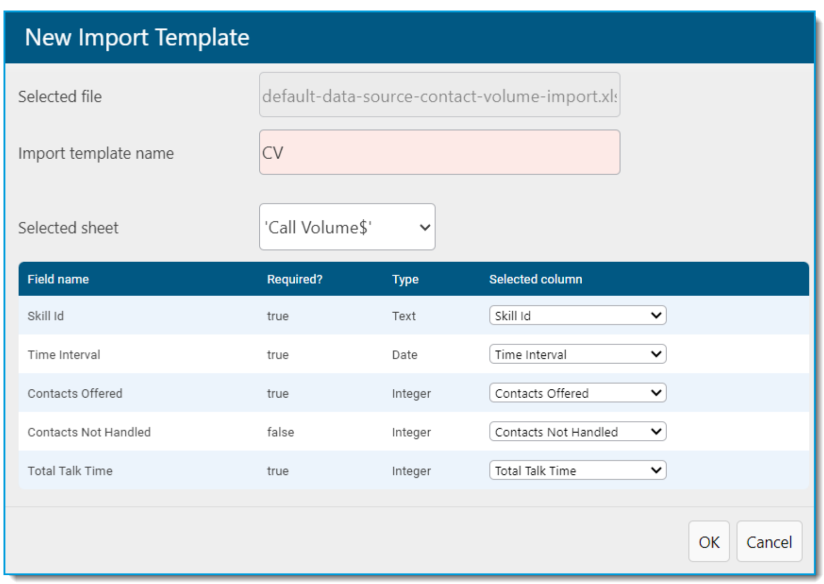
The template is a mapping device to make sure the data imported matches the tables in the system. Once created you shouldn't have to have more than one template.




Select from existing templates or create a new template.

### Create a new Import Template

The template defines the field names, required or not, the data type, and the column name. Confirm that each field name matches a column in your imported worksheet then click *OK*.



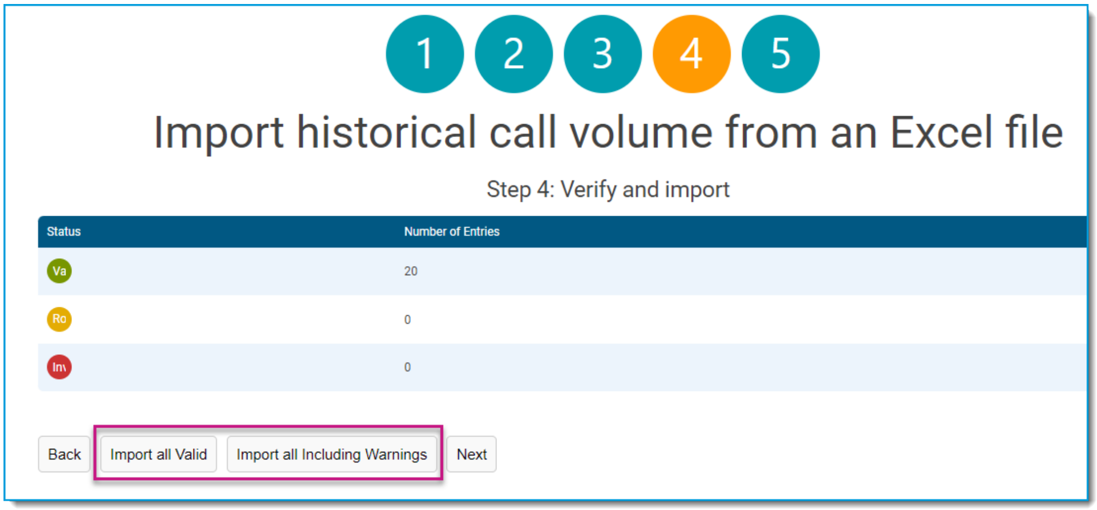
## Step 4 Verify and import

Review the table for the total number of—

- Valid rows ready for import
- Rows with warnings ready for import
- Invalid rows that cannot be imported

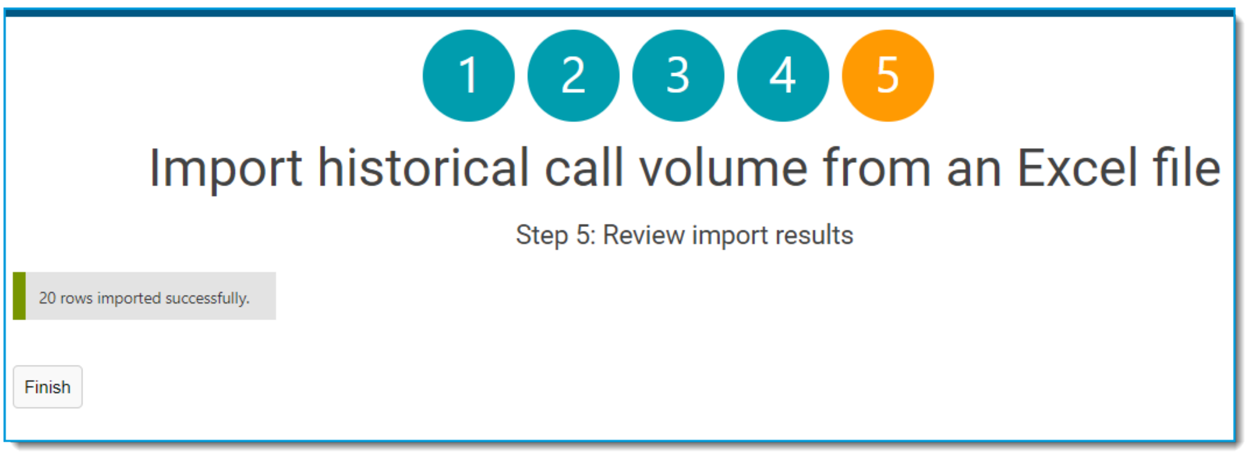
You may choose to import only the valid rows, or also include the rows with warnings.

Select one import option and it will advance to the next step.




## Step 5: Review import results

View the number of rows imported then click *Finish*.



## View Imported Data

To view the imported data, select *Run contact volume history reports* in the reports tab and enter the date range. In the Options window make selections then click *Apply options*.