Product: Tapit 2000

Subject: Import of Users, Clients and Departments

Date: August 8, 2002

The import of information into Tapit 2000 requires strict adherence in file format as noted in this document. Failure to meet these requirements can result in import errors based on incorrect or duplicated data conditions.

This document is divided into three parts: Users, Departments and Clients. For the purposes of this document the following information is used:

First Last is our Example user. He is assigned to the Customer Service department and has Extension 888. His user authorization code is 9999.

Customer Service was the first department entered so the department ID number is 1.

The Example client is Trisys Inc, located at 215 Ridgedale Avenue Second Floor in Florham Park NJ 07932. Their telephone number is 973-360-2300.

<u>Users</u> – Import of user information requires two files, **user.txt** and **userexte.txt**. Each of these files has a required format and is outlined below. No fields can contain a math operand, i.e. + - * / or commas.

User.txt

1,Last,First,$0.00,$0.00,0,9999,1

1 = User ID (Must be unique)
Last = User Last Name (30 character max)
First = User First Name (20 character max)
$0.00 = User Per Call Surcharge
$0.00 = User Per Minute Surcharge
0 = User Multiplier (Percentage of surcharge)
9999 = User Authorization Code (16 digit max)
1 = User Department ID

Userexte.txt

888,1

888 = User Extension (7 digit max)
1 = User ID (Must be unique)

Departments – The import of department information requires one file departme.txt.
This file has the following required format:

Departme.txt

1,Customer Service,1,2
2,Florham Park,0,0

1 = Department ID (Must be unique)
Customer Service = Department Name (30 character max)
1 = Child Department indicator
2 = Parent Department ID

Clients – The import of client information requires two files, **client.txt** and **clientph.txt**.
Each of these files has a required format and is outlined below. No fields can contain a
math operand, i.e. + - * / or commas.

Client.txt

1,77777,Trisys Inc,Tapit2000,,215 Ridgedale Avenue,Second Floor,,Florham Park,NJ,07932

1 = Client ID (Must be unique)
77777 = Account Code (15 character max)
Trisys Inc. = Company/Last Name (30 character max)
Tapit2000 = First Name (20 character max)
Blank = Unused field
215 Ridgedale Avenue = Address1 (30 character max)
Second Floor = Address2 (30 character max)
Blank = Unused field
Florham Park = City (16 characters max)
NJ = State (2 character max)
07932 = ZIP Code (10 character max)

Clientph.txt

1, 9733602300

1 = Client ID
9733602300 = Telephone number (No dashes)

Database Backup

It is strongly recommended that your Tapit database, tapitdb.mdb, be backed up to provide restore capability in the event the import attempt yields errors or other undesired results. Close Tapit 2000 and copy the file tapitdb.mdb to a safe location before proceeding with the import attempt.

Data Source

The source of this data can be another database or a spreadsheet. The necessary data will need to be manipulated in order to place it in the proper order and with the proper sequential numbering as noted above. Once ordered it needs to be exported to a comma separated file(s) as noted above with the appropriate fields and blank fields included and accounted for.

If there are any questions about this guide please contact Trisys Tech Support:

973-360-2300 x3 or Tech@trisys.com