

How to: Import Contacts into Updox

How do I import contacts?

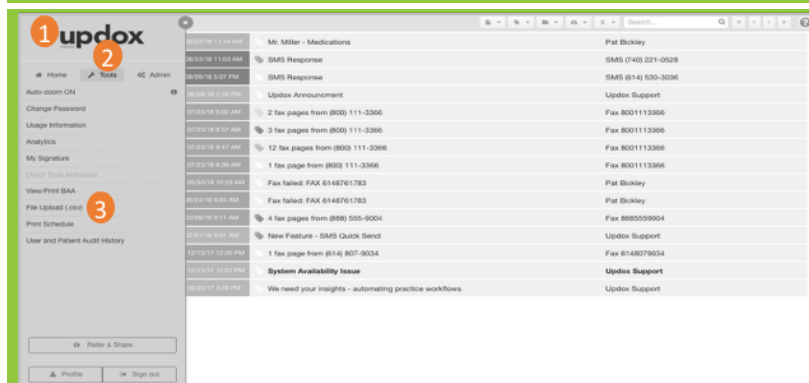
A quick way to get the Updox Address Book updated with your contacts is to import them. Once your Updox Address Book has been updated, you can begin using any of the Updox Communication products.

Follow these step-by-step instructions:

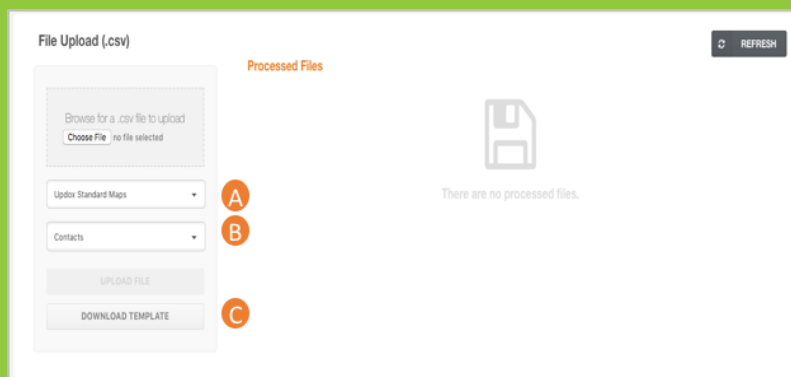
Create your source file

Import file must be .CSV

Your source system where you will export contacts must be able to create a .CSV file type.



1. From the Inbox, go to Menu.
2. Select Tools.
3. Select File Upload (.csv).



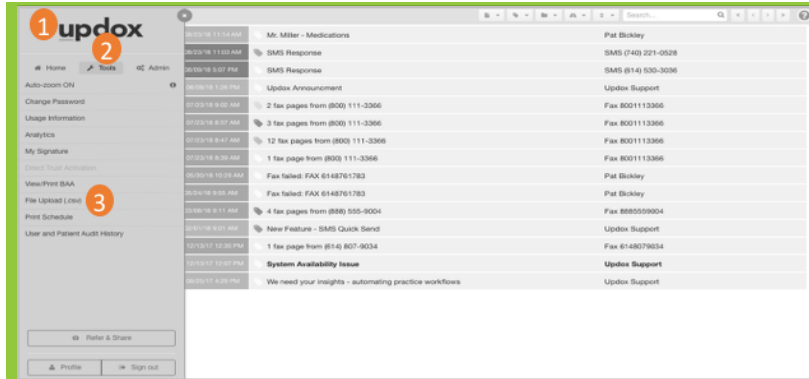
4. Create your source file as the first step. The file must be created in a specific format. We have included a template for you to follow.

- a. Select Updox Standard Maps from the Select Your Vendor Version dropdown
- b. Select Contacts from the Select Your File Type dropdown.
- c. Select Download Template

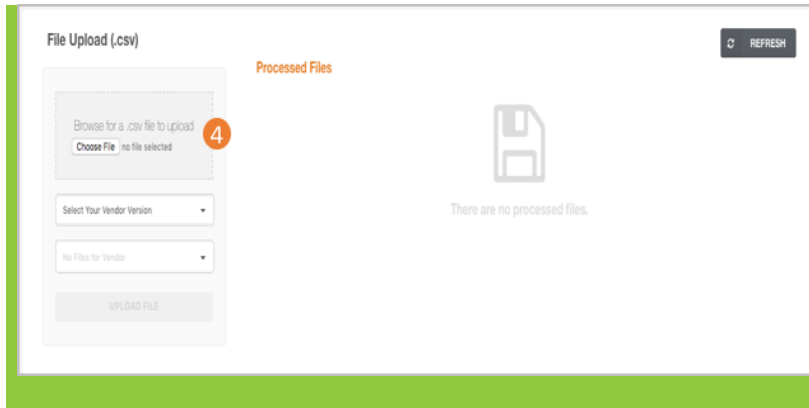
NOTE: A sample .CSV file will open in a separate tab. When creating your source file, you must follow the format exactly as displayed making sure the columns are in the correct order.

NOTE: The Patient ID column is used for both patients and contacts so include a Contact ID in this field.

Upload your file



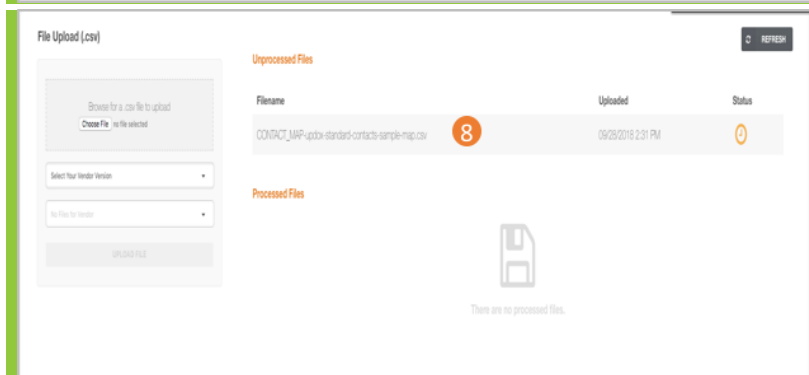
1. From the Inbox, go to Menu.
2. Select Tools.
3. Select File Upload (.csv).



4. Choose the .CSV file you created in the previous step.



5. Select Updox Standard Maps from the Select Your Vendor Version dropdown.
6. Select Contacts from the Select Your File Type dropdown.
7. Select Upload File.



8. Your .CSV file will display under Unprocessed Files. **NOTE:** Your file will move from Unprocessed Files to Processed Files automatically.

Troubleshooting

If your file fails to upload, check the following.

- Make sure the columns in your file are in the same order as the template.
- Check the format of how you added zip codes and make sure it matches the sample in the template.

For more information, contact Updox at:

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