



initial data import - COMMUNITY

Use the following guide as a basis for adding your data to an import CSV file. It is highly recommended that this list be used in conjunction with the details provided on the import Contacts + Client page in ARM. NB: These fields are the standard fields some of which you may choose to archive. Custom fields can also be created and used for your initial data import.

ARM Import Field	Example	Options	Notes
Contact GUID	16a8d8ec-ab0d-e611-80f8-c03c50f328bb		Leave blank - GUIDs are automatically created on import
Contact personal account manager	CITIZEN John	Self-organisation staff list	Must be in LAST NAME First name; Staff member must exist in the system
Contact visible in eMarketing only	N		Enter N if the contact is not to be visible in only eMarketing
Contact first name	Mary	Free text field	
Contact last name	Smith	Free text field	
Contact email address 1	mary@test.com		Must be in email format NB: This is an required field for Staff Administration
Contact email address 2	mary@testmail.com		Must be in email format
Contact personal title	Mr		Dr; Mr ; Mrs; Ms; Other; Prof NB: Selecting other requires an additional entry in 'Contact personal title other'
Contact personal title other		Free text field	Enter 'Other' in 'Contact personal title'
Contact team	Support Team A	Choose from a pre-defined list	Review ARM to see options. Additional teams can be added by selecting - Customise teams + locations NB: Only relevant for Staff not Clients/Contacts
Primary role	Administrator	Choose from a pre-defined list	Review ARM to see options. Additional Roles can be added by selecting - Customise Roles (ARM Pro only) If this contact is a participant this will be left blank NB: This is an required field for Staff if using PocketWatch or 94six
Position title	Participant	Free text field	.If this contact is a participant mark as participant or your organisations naming convention. Other options include parent, sibling etc.
Contact phone 1	07 5543 6782	Free text field	NB: This field is required for Staff
Contact phone 2	07 5543 6783	Free text field	
Contact fax	07 5543 6784	Free text field	
Contact shareholding			N/A
Contact accepts marketing contact	Y	Choose from a pre-defined list	Yes = Y No = N

Contact details

			Unsubscribed is created if the client unsubscribes from contact lists
Contact home phone	07 5543 6785	Free text field	
Contact home country	Australia	Choose from a pre-defined list	Review ARM to see options. Full name not abbreviated
Contact home address	130 No Place Street	Free text field	
Contact home suburb	Likehome		
Contact home address 2			Second line of address if required
Contact home town/city	Sampleville		
Contact home state/region	QLD	Choose from a pre-defined list	Abbreviated state names
Contact home post/zip code	4545	Free text field	
Contact gender	Female	Choose from a pre-defined list	Unspecified; Male; Female NB: Will not accept shortforms (M; F; U)
Contact home postal address			If required as per home address field
Contact home postal suburb			If required as per home suburb field
Contact home postal address 2			If required as per home address 2 field
Contact home postal town/city			If required as per home town/city field
Contact home postal state/region			If required as per home state/region field
Contact home postal post/zip code			If required as per home post/zip code field
Contact send birthday reminder	Y	Choose from a pre-defined list	Yes = Y No = N NB: Account manager for the client must have an assistant assigned for this notification to be received.
Contact birthday	8 Aug 1994		Date field must follow format 'DD MMM YYYY'
Contact partner first name	John	Free text field	
Contact partner last name	Smith	Free text field	
Contact send partner birthday reminder	Y	Choose from a pre-defined list	Yes = Y No = N NB: Account manager for the client must have an assistant assigned for this notification to be received.
Contact partner birthday	8 Sep 1949		Date field must follow format 'D MMM YYYY'
Contact number of children	2	Any number	
Contact Facebook URL	http://www.facebook.com/mary	Free text field	URL is required
Contact Twitter URL	http://www.twitter.com/mary	Free text field	URL is required
Contact YouTube URL	http://www.youtube.com/mary	Free text field	URL is required
Contact LinkedIn URL	http://www.linkedin.com/mary	Free text field	URL is required

	Contact other social media		Free text field	As per other social media formats - direct link
	Contact hobbies/ interests	Gardening	Free text field	
	Contact additional information		Free text field	NB: Character limit 350 characters This information will flag on the main client panel as an alert if the correct settings have been applied.
	Unique contact code		Free text field	
Client Details	Client GUID	15a8d8ec-ab0d-e611-80f8-c03c50f328bb		Leave blank - GUIDs are automatically created on import
	Client name	Name of Client	Free text field	For participants - Example Participant Name Folder Participant Name File Participant Name Group For businesses - Business Name
	Unique code		Free text field	Participants : Adding the NDIS number here will display on the main client panel screen ONLY. It will also be a searchable option in the advanced search. Providers/Suppliers : Adding the ABN here will display on the main client panel screen ONLY. It will also be a searchable option in the advanced search.
	Trading name	Financial Planner	Free text field	
	Business number	12 345 678 912	Free text field	ABN is recommended
	Org. account manager	CITIZEN John	Self-organisation staff list	Format LAST NAME First name
	Web address	http://mypcorp.com/	Free text field	URL is required
	Relationship	Participant; NDIS; Self Managed	Choose from a pre-defined list	Review ARM to see options. Additional relationships can be added by selecting - Customise relationships (ARM Pro only) Plan Managers should utilise this field to tag suppliers/providers
	Activities		Free text field	Description of a business activities ie Plan Managers for youth only.
	Client phone 1	07 5544 6782	Free text field	Business phone number or Participant phone number will display on front panel
	Client phone 2	07 5544 6783	Free text field	
	Client fax	07 5544 6784	Free text field	
	Country	Australia	Choose from a pre-defined list	Review ARM to see options. Full name not abbreviated
	Street address	15 Regen St	Free text field	Business address or Participant address will display on front panel
	Suburb	BRISBANE	Free text field	Capitalised name
	Street address 2			Second line of address if required
	Town/City	BRISBANE	Free text field	Capitalised name
	State/Region	QLD	Choose from a pre-defined list	Abbreviated state names
	Post/Zip code	4000	Free text field	Will pre fill from defined list
	Postal address			If required as per client address field
	Postal suburb			If required as per client suburb field
	Postal address 2			If required as per client address 2 field
	Postal town/city			If required as per client town/city field
Postal state/region			If required as per client state/region field	
Postal post/zip code			If required as per client post/zip code field	

Introduction source	Client	Choose from a pre-defined list	Advertising; Alliance network; Client; Colleague; Direct mail; Email broadcast; Event; Other; Search engine; Social media; Telemarketing; Website; Word of mouth
Introduction details	Corporation	Free text field	
Client Facebook URL	http://www.facebook.com/financialplanner	Free text field	URL is required
Client Twitter URL	http://www.twitter.com/financialplanner	Free text field	URL is required
Client YouTube URL	http://www.youtube.com/financialplanner	Free text field	URL is required
Client LinkedIn URL	http://www.linkedin.com/financialplanner	Free text field	URL is required
Client other social media		Free text field	As per other social media formats - direct link
Industry sector		Choose from a pre-defined list	N/A
Employees		Choose from a pre-defined list	N/A
Total number of clients		Free text field	N/A
Annual turnover range		Choose from a pre-defined list	N/A
Organisation structure		Choose from a pre-defined list	N/A
Financial year start month		Choose from a pre-defined list	N/A
Venue capacity		Free text	N/A
Venue type		Choose from a pre-defined list	N/A
Venue key contact		Choose from a pre-defined list	N/A