Data import – importing contact location data

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A comprehensive guide to importing contact location data. This process supports the bulk creation of contact records and links them directly to locations. It streamlines initial setup and mass updates.

📖 Key terminology

The following terms are defined for clarity throughout this guide:

- **Contact location:** A master data record that links a specific contact person (name, email, phone) to a specific physical location.
- **Location:** The physical address, warehouse, or delivery point the contact is assigned to. *The location must already exist in the Qargo system.*
- **Contact:** The specific person being recorded (e.g., warehouse manager, shipping clerk) who can be linked to a location.

✅ Critical import requirements for containers

The following requirements and warnings must be considered before importing contact location data. This ensures data integrity.

- **Location prerequisite:** Before a contact can be imported and linked to a location, the **location record must already exist in the Qargo system**. The import fails if the specified location cannot be found.
- **Mandatory fields:** The **location name** and **contact name** are mandatory fields. An import fails if either of these is left blank.

🛠️ Step-by-step data import process

Step 1: Download the template

A specific spreadsheet template is available for uploading contact location data:
Contact location import template

> 📚 Always use a blank template downloaded directly from here or provided by the Qargo team. Reusing an old template may lead to import errors.

Step 2: Fill in the Excel template

Open the template and fill it in with the required data. The template contains column headers that match the fields in Qargo.

- **Required fields:** All required fields must be filled in. A complete list of required fields is in the next section of this article. An import fails if these fields are left blank.
- **Formatting:** Close attention should be paid to the specified data format (e.g., dates, numbers, text).

Step 3: Submit for upload

1. **During onboarding:** Work directly with the **onboarding manager** to upload the initial business data. The onboarding manager guides the process and ensures a successful import.
2. **After onboarding:** For all future data updates and imports, contact the **account manager**. The account manager assists with the upload process and provides ongoing support.

📝 Details of the contact location import template

The following table explains the Excel template for contact location import field by field. It covers data formats, required fields, and best practices for filling in each column.

Column name	Required/optional	Remarks	Example
name	Required		
email			
phone_number			
job_title			
has_role_billing			
has_role_operations			
has_role_cmr_processing			
location_name	Required		
location_address			
location_city			
location_country			
latitude			
longitude			
location_address_second_line			
location_postal_code			
location_identifier			
location_state			
location_place_id			
location_row_id			

🔎 Troubleshooting common contact location import errors

This section covers specific errors that may occur when importing contact location data.

- **Location record not found:** This is the most common error. It occurs when the unique identifier for the location in the template does not exactly match an existing location record in Qargo. **The location must exist in the system before a contact can be imported and linked to it.**
- **Sheet name:** The sheet in the Excel template file must be named exactly **'Import'**. Any other name causes an error when the file is uploaded.
- **Missing mandatory field:** The import fails for any row where the **location identifier** or **contact name** is left blank.
- **Case-sensitive column headers:** Column headers must be entered with the correct casing. Incorrect casing causes the data in that column to be silently ignored and not imported.
- **Leading apostrophe errors:** Data in a cell cannot begin with an apostrophe ('). If an apostrophe is used, the system does not recognize the value, and an error may occur.

✨ Best practices for contact location containers

The following best practices help ensure a smooth and accurate import:

- **Maintain data consistency:** Pay close attention to the spelling and capitalization of **location names** and **contact names**. Any inconsistency prevents the link from being created.

📈 Use cases for contact location import

Importing contact location data is a valuable tool for several key business processes:

- **Initial setup efficiency:** The main use case is to quickly fill a Qargo tenant with contact details linked to a large number of warehouse or delivery locations.
- **Mass updates:** When contacts change across multiple sites, their details can be added or corrected in bulk with this import tool.
- **Data consolidation:** When onboarding a new business unit or integrating location data from another system, the contact details can be added and linked to their locations efficiently.