**RISPIRA Import Package v1.0**

Using the following import process, you can import **clients**, **addresses**, **employers**, and **policies** (referred to as *import types*). This document will help you understand the over process. The include “Field Details.xlsx” file goes into detail about each field and its requirements.

Use the accompanying for (“import\_form.csv”) to copy/enter your client data for import.

**Frequently Asked Questions**

**How Required Fields are handled:**

If a required field is missing from any of the import types, that type will not be saved. Since the address, employer and policies require a client, The two fields that are required for a line to not be skipped completely are “**first\_name**” and “**personal\_email**”.

**How Duplicates are handled:**

We do attempt to avoid duplicates. We do this by checking that all fields per import type have the same values. If even one field is different, we will assume it is a different client to avoid losing any data.

**How to Enter Multiple Policies, Addresses, and/or Employers:**

To enter multiple Policies, Addresses, and/or Employers, we take advantage of or duplicate removal functionality by ensure all client data is the exact same over multiple lines. As an example, to import a client with two policies you would create two rows on the “import\_form.csv” and ensure that all of the client fields (see “Field Details.xlsx” for which fields are client fields) are the exact same with the different policy information on each line. This will ensure only one client is created for the two policies.