

siterra | Knowledge Base Article

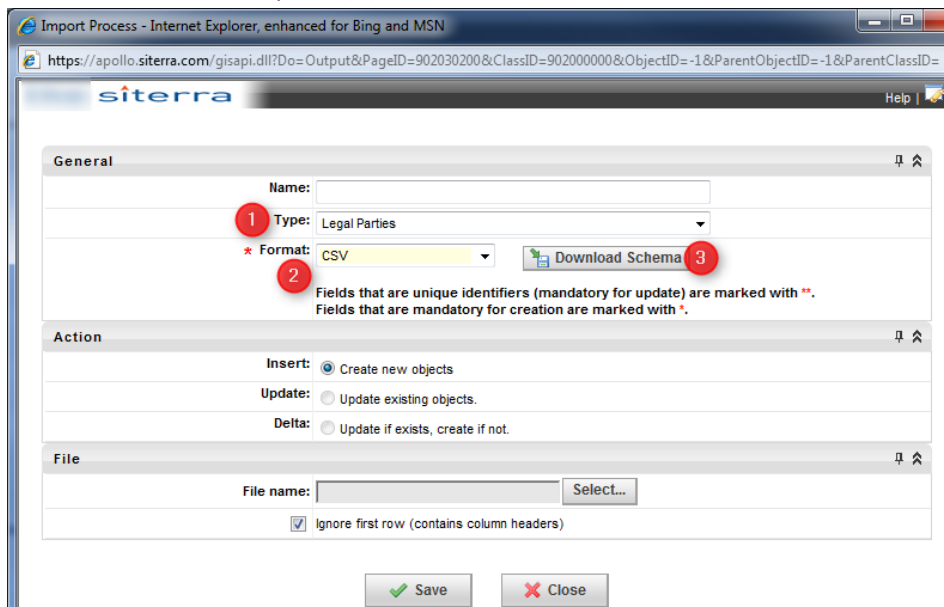
How To - Add Contacts To A Lease Using The Import Tool

Overview:

This document will explain how to add existing contacts in a domain's directory to the "Legal Parties" section of a lease. This is a useful tool because any information already attached to that contact in the "Contacts" list- such as company, address, phone number, and email address- will automatically populate into the entry on the lease.

Steps:

- From the main navigation list at the top of your Siterra navigation window, go to Tools -> Import/Export -> Import and click the  button. In the new window, select the type "Legal Parties" (1), choose the desired file format (for example, CSV) (2), and select the "Download Schema" option (3).



- Once the schema is downloaded, note that the columns that must be completed to add contacts from the Contacts list are:

	A	B	C	D	E	F	G	H	I
1	*Contract Id	*Party Type	*Entity Type Id	***NO - VARCHAR2(30)	'Share Of Rights -	'Party Description -	'Organization Unit Name -	'Vendor Name -	Contact Name -
2	(1)	(2)	(3)						(4)
3									

- (1) Contract Id – this is the lease *number* where the contact is to be added. The same lease number may be used on multiple import rows to add additional contacts to the same lease.

- (2) Party Type – This is where the contact is assigned a legal party designation. Available options can be found by expanding the column heading.
- (3) Entity Type Id – Simply put “Contact” in this column. This schema can also be used to assign vendors as legal parties.
- (4) Contact Name – Despite the label, this is the *unique ID number* assigned to the contact. This ID number can be found under the ‘Contact Details’ section on every contact page:

Contact Details	
* User?	Yes
First Name:	Siterra
Middle Name:	
Last Name:	User
Company:	
* Display Name:	Siterra User
Number:	1548684
Title:	
Email:	

- 3. Repeat the above steps for all contacts to be added. In addition to adding multiple contacts to the same lease, the same contact can also be added as a legal party to multiple leases in the same import as well.
- 4. When the file is saved and ready for import, go back into the Import tool window. The “Insert” action will auto-select for this particular import type. Click the “Select...” button (1) to open Windows Explorer and locate the correct file, then click “Save” (2) to proceed.

File	
File name:	C:\Users\apearl\Desktop\1005480-702000 Select...
☒	Ignore first row (contains column headers)

2
✓ Save
✗ Close

- 5. Once the import file is saved, there will now be the option at the bottom of the window to “Execute”.
- 6. There is also now a ‘Process’ section with the options to “Dry Run” or “Import”. A dry run will test the file for common errors without modifying data, and is optional.

General

Name: New Import - 1474778

Type: Legal Parties

* Format: CSV [Download Schema](#)

Fields that are unique identifiers (mandatory for update) are marked with **. Fields that are mandatory for creation are marked with *.

Process: ☐ Dry Run ☒ Import

Action

Insert: ☒ Create new objects

Update: ☐ Update existing objects.

Delta: ☐ Update if exists, create if not.

File

File name: 1005480-702000000-04-04-17(1).xlsx [Select...](#) [Download File](#)

☒ Ignore first row (contains column headers)

Total rows in file:	0
Rows processed:	0
Rows processed successfully:	0
Rows Failed:	0
ST:	0.00.0.0
Status:	In definition

[Save](#) [Execute](#) [Close](#)

7. Once the “Import” process is selected and “Execute” is clicked, a confirmation page will appear. Select “OK, and the import will be processing within 15-20 seconds.
8. When the import hits 100% completion, all data has been processed and should now appear on the appropriate lease pages. This information will also be reflected in the Business Intelligence reporting system and available on lease reports once BI has been refreshed (usually within 24 hours).