

Migration – Client CSV Import

- Click the Migration link in the main Navigation menu of your eBoss database
- Click the Client CSV Import Tab
- Here you are able to download a Template, insert your Client data, and upload it to your eBoss database for Import. We have provided a template to allow you to see which fields can be migrated into the database. Your data columns do not have to be in the same order as those shown on our template.

Downloading the CSV Template (for Excel)

- Right click 'Download CSV Template'
- Choose Save As...
- Select an easy to remember Folder to Save to
 - (we recommend your Desktop as this is always easiest to find)
- Click Save
- "clients_data_headers_for_migration.csv" is saved to your desktop

Adding Client Data to the CSV File

- Open "clients_data_headers_for_migration.csv" with Excel, Open Office, or your favourite Spread sheet program
- Ensure you leave Row 1 unchanged
- Enter your Client data
 - Either by typing in, or
 - By Copying / Pasting columns from an existing spread sheet
- Save "clients_data_headers_for_migration.csv" once finished

Uploading a CSV File

- Click the Upload a File link
- Browse to your CSV file on your PC (on your Desktop if you followed the above)
- Select it and click Open
- Your Client CSV file is uploaded to your eBoss Database
- Click the 'process' link to view the first few lines of your data.

- Select a heading for each column from the drop down lists. If you do not select a heading the data from that column will not be migrated onto eBoss.
- Click 'Process' in the panel below to start the data Import

CSV files are usually processed within a few minutes, depending on the amount of data they contain.

CSV Files – Processed

Once a CSV file has been processed onto your eBoss database, you will see it displayed in the 'Processed Docs' area towards the bottom of the screen.