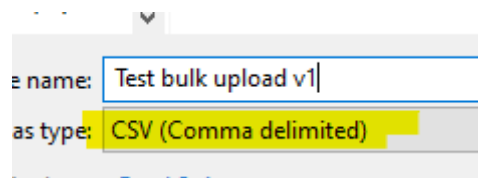


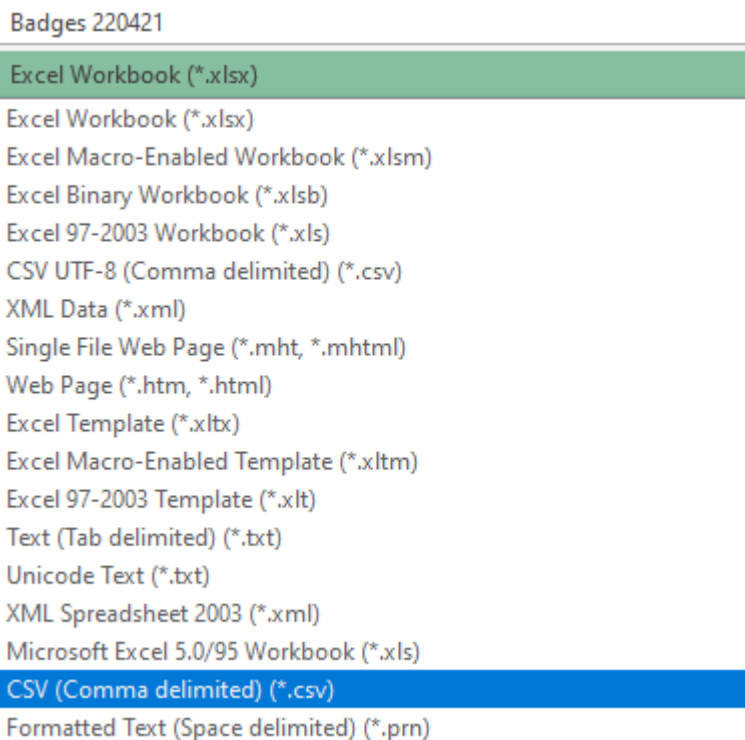
Achievements and Test Bulk Upload

Step 1 – prepare the import file

- It is best to do this as you are setting up the rallies and tests.
- ONLY date permitted in the upload file is Pony Club Number, Qualification, Date Achieved and Expiry Date (left blank for achievements and tests) – template on the Pelham Branch page here <https://pelham.pcuk.org/user-guide-list-branches.php>
- **Top Tip:** If you use an excel spreadsheet including the above fields AND the member name to track who is doing what, you can then delete the columns with the member name, save as CSV and you have your upload file.
- Once completed, it MUST be saved as a CSV (comma delimited) file (default if using the template):

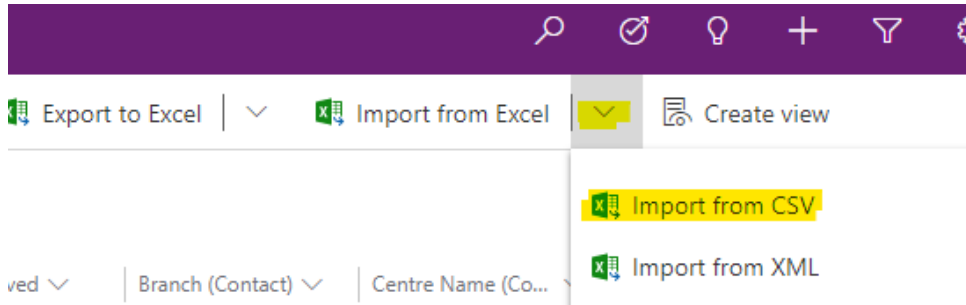


- If you use an excel file and then want to convert to be the upload file, it must be CSV (comma delimited):



Step 2 – Import to PELHAM

- Go to Achievement History in LH menu
- In the top bar you will see Export to Excel and Import from Excel
- Click down arrow next to Import from Excel and select “import from CSV”



- Select the file you want to import and press Next (bottom right of screen)

Import from CSV

File Upload

Choose File

No file chose

Owner For Imported Records

The Next screen appears, go to bottom and select Review Mapping:

Import from CSV



You're about to import Badges 220421.csv

186 Bytes

Import Settings

Alternate Key

Select An Alternate Key



Delimiter Settings

Data Delimiter

Quotation mark (")



Field Delimiter

Comma (,)



First row contains column headings

Duplicate Data Settings

Allow Duplicates

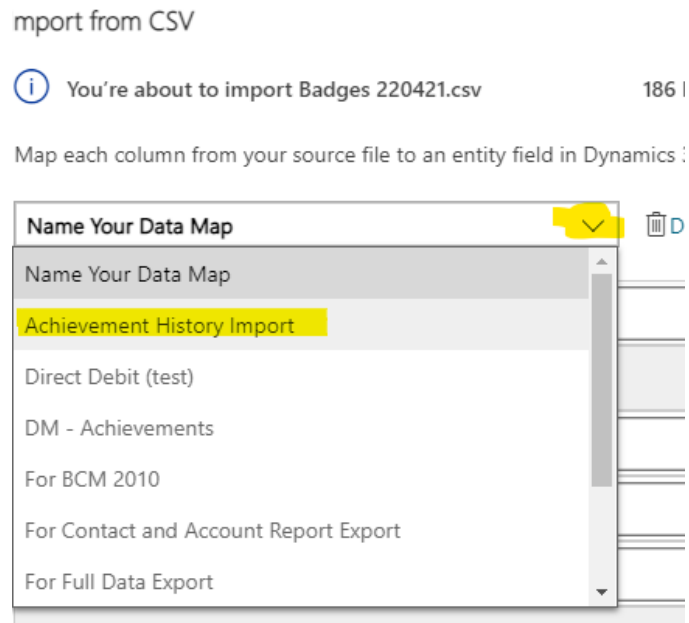


No

Back

Review Mapping

- Next, you need to select the type of data map, click the down arrow next to Name Your Data Map and select Achievement history Import



- Then select FINISH IMPORT at bottom of the screen.

Depending on the size of the import, PELHAM will be updated in a few seconds or minutes.

Import from CSV



You're about to import Badges 220421.csv

186 Bytes

Map each column from your source file to an entity field in Dynamics 365.

Achievement History Import Delete

Map Attributes		Show All	
Primary Fields			
Date Achieved *		Date Achieved	
Contact (Lookup) *		Pony Club Number	
Qualification (Loo... *		Qualification	
Optional Fields			
Source Fields		Dynamics 365 Entity Fields	
Expiry Date		Expiry Date	



[Back](#) [Finish Import](#)