

Cerenade can facilitate the seamless import of your contact and case data through Microsoft Excel spreadsheet templates. Please find below links to the template files and guidance on how enter data within them. After completing the templates, please contact your Cerenade representative for a secure submission link.

CONTACT DATA IMPORT

Utilize the *Contact_Record.xlsx* file to input your contact data.

Available at URL: https://www.cerenade.com/wp-content/uploads/2023/11/Contact_Records.xlsx

Refer to the provided instructions and examples within the file to structure your entries correctly. Note that this Excel workbook comprises two distinct worksheets. The first sheet ("Data Fields to Import") serves as the data entry template. The second sheet ("Schema for Data Fields") outlines field names, types, character limits, and descriptions.

EXPLANATION:
 Row 1 : This Explanation. For more information, see sheet "Schema for Data Fields".
 Row 2: Column Numbers.
 Row 3: Column Headers (Do Not Modify, EXCEPT FOR CUSTOM FIELD LABELS, EX. "Custom_fid1" can be changed to "XXX")
 Row 4: Maximum Number of Characters allowed in the column.
 NOTE: Enter your data starting on Row 5. Please Do Not modify Rows 1-4. A Client First & Last Name is required for a row to transfer NOTE: All Data entered must be in TEXT fields. By default all fields are formatted as TEXT fields. Please make sure to not change this setting. If the setting is changed, please highlight all fields, right click, choose TEXT.

| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 |
|----------|-------|-------|-------|---------|--------|-------------|----------------|---------|-------------|-----------|---------|---------------|
| AlienId | Title | Last | First | MidName | Maiden | MailCareOf | MailStr | MailApt | MailCity | MailState | MailZip | MailCountry |
| RESERVED | 20 | 30 | 30 | 30 | 60 | 50 | 50 | 10 | 40 | 20 | 20 | 40 |
| | Mr | Smith | Frank | James | | James Smith | 123 Fake St. | | Los Angeles | CA | 90045 | United States |
| | Mrs | Lee | Sarah | | Chang | Sarah Lee | 400 W. 4th St. | | Los Angeles | CA | 90045 | United States |

| | A | B | C | D | E |
|----|-------------------------------|----------------|------------|------------|---|
| 1 | Schema For Data Fields | | | | |
| 2 | Column | Field Name | Field Type | Field Size | Explanation |
| 3 | 1 | AlienId | Integer | | RESERVED |
| 4 | 2 | Title | Char | 20 | Mr., Mrs., etc. |
| 5 | 3 | Last | Char | 30 | Last Name |
| 6 | 4 | First | Char | 30 | First Name |
| 7 | 5 | MidName | Char | 30 | Middle Name |
| 8 | 6 | Maiden | Char | 60 | Maiden Name |
| 9 | 7 | MailCareOf | Char | 50 | Mailing Address - C/O |
| 10 | 8 | MailStr | Char | 50 | Mailing Address - Number & Street |
| 11 | 9 | MailApt | Char | 10 | Mailing Address - Apt # |
| 12 | 10 | MailCity | Char | 40 | Mailing Address - City |
| 13 | 11 | MailState | Char | 20 | Mailing Address - State |
| 14 | 12 | MailZip | Char | 20 | Mailing Address - ZIP Code |
| 15 | 13 | MailCountry | Char | 40 | Mailing Address - Country |
| 16 | 14 | ResCareOf | Char | 50 | Residence Address - C/O |
| 17 | 15 | ResStr | Char | 50 | Residence Address - Number & Street |
| 18 | 16 | ResApt | Char | 10 | Residence Address - Apt # |
| 19 | 17 | ResCity | Char | 40 | Residence Address - City |
| 20 | 18 | ResState | Char | 20 | Residence Address - State |
| 21 | 19 | ResZip | Char | 20 | Residence Address - ZIP Code |
| 22 | 20 | ResCountry | Char | 40 | Residence Address - Country |
| 23 | 21 | AbdCareOf | Char | 50 | Address Abroad - C/O |
| 24 | 22 | AbdStr | Char | 50 | Address Abroad - Number & Street |
| 25 | 23 | AbdApt | Char | 10 | Address Abroad - Apt # |
| 26 | 24 | AbdCity | Char | 40 | Address Abroad - City |
| 27 | 25 | AbdState | Char | 20 | Address Abroad - State |
| 28 | 26 | AbdZip | Char | 20 | Address Abroad - ZIP Code |
| 29 | 27 | AbdCountry | Char | 40 | Address Abroad - Country |
| 30 | 28 | DOB | Char | 25 | Date Of Birth |
| 31 | 29 | POB | Char | 40 | Place Of Birth - City |
| 32 | 30 | POBState | Char | 20 | Place Of Birth - State |
| 33 | 31 | POBCountry | Char | 40 | Place Of Birth - Country |
| 34 | 32 | PPNum | Char | 20 | Passport - Number |
| 35 | 33 | PPIssueCountry | Char | 40 | Passport - Issuing Country |
| 36 | 34 | PPExpireOn | Char | 25 | Passport - Expiration Date (mm/dd/yyyy) |

< > Data Fields to Import **Schema for Data Fields** +

Note that you may import contact data without also importing case data.

However, to import case data, you must also import contact data. In doing so, you may choose to override the reserved **AlienID** column in the *Contact_Record.xlsx* template. Please read the 'Case Data Import' section for more on this.

CASE DATA IMPORT

Utilize the *Case_Records.xlsx* file to input your case data.

Available at URL: https://www.cerenade.com/wp-content/uploads/2023/11/Case_Records.xlsx

Refer to the provided instructions and examples within the file to structure your entries correctly. Like contact data import, the Excel workbook for case data includes two worksheets. The initial sheet serves as the data entry template. The second sheet, titled "Schema for Data Fields," outlines field-specific requirements and character limits.

EXPLANATION:
 Row 1 : This Explanation. For more information, see sheet "Schema for Data Fields".
 Row 2: Column Numbers.
 Row 3: Column Headers (Do Not Modify, EXCEPT FOR CUSTOM FIELD LABELS, EX. "Custom_fld1" can be changed to "XXX")
 Row 4: Maximum Number of Characters allowed in the column.
NOTE: Enter your data starting on Row 5. Please Do Not modify Rows 1-4. **NOTE:** All Data entered must be formatted as TEXT Fields. By default all fields are formatted as TEXT. If a field's setting is changed, please highlight all fields, right click, go to format cells, and choose TEXT.

| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | |
|----------|----------|---------------------|-----------------|-------------|--------------|--------|--------------------|-----------------|----|
| Caseld | CaseName | CaseNum | ExternalCaseNum | ProgramType | Category | Status | Process | ApplicationDate | |
| RESERVED | | 100 | 100 | 100 | 100 | 100 | 10 | 100 | 25 |
| | | 20221001_SmithFrank | 125648 | New Filing | Family Based | Active | Naturalization | 10/20/2022 | |
| | | 20221205_LeeSarah | 256585 | Extension | Family Based | Active | Green Card Renewal | 12/25/2022 | |

| Column | Field Name | Field Type | Field Size | Explanation |
|--------|-----------------|------------|------------|--|
| 1 | Caseld | Integer | | RESERVED |
| 2 | CaseName | Char | 100 | Case Name |
| 3 | CaseNum | Char | 100 | Case Number |
| 4 | ExternalCaseNum | Char | 100 | External Case Number |
| 5 | ProgramType | Char | 100 | Case Program Type *** NOTE: There is a 255 program type limit. Please make sure you do not have more than 255. |
| 6 | Category | Char | 100 | Case Category *** NOTE: There is a 255 category limit. Please make sure you do not have more than 255. |
| 7 | Status | Char | 10 | Case Status ***NOTE: We only accept the following statuses: (Active, Closed, Archived). *** |
| 8 | Process | Char | 100 | Case Process |
| 9 | ApplicationDate | Char | 25 | Case Application Date |
| 10 | ProcessingDate | Char | 25 | Case Processing Date |
| 11 | ExpirationDate | Char | 25 | Case Expiration Date |
| 12 | DenialDate | Char | 25 | Case Denial Date |
| 13 | Comments | Char | | Case Comments |
| 14 | MainPartyID | Char | | Case's Main Party ID (MUST BE IDENTICAL TO THE ALIENID IN THE CONTACT_RECORDS FILE) |
| 15 | Custom_fld1 | Char | | Custom Field (To be used if you have any data you want entered that is not in the above fields) |
| 16 | Custom_fld2 | Char | | Custom Field (To be used if you have any data you want entered that is not in the above fields) |
| 17 | Custom_fld3 | Char | | Custom Field (To be used if you have any data you want entered that is not in the above fields) |
| 18 | Custom_fld4 | Char | | Custom Field (To be used if you have any data you want entered that is not in the above fields) |
| 19 | Custom_fld5 | Char | | Custom Field (To be used if you have any data you want entered that is not in the above fields) |
| 20 | Custom_fld6 | Char | | Custom Field (To be used if you have any data you want entered that is not in the above fields) |
| 21 | Custom_fld7 | Char | | Custom Field (To be used if you have any data you want entered that is not in the above fields) |
| 22 | Custom_fld8 | Char | | Custom Field (To be used if you have any data you want entered that is not in the above fields) |
| 23 | Custom_fld9 | Char | | Custom Field (To be used if you have any data you want entered that is not in the above fields) |
| 24 | Custom_fld10 | Char | | Custom Field (To be used if you have any data you want entered that is not in the above fields) |
| 25 | Custom_fld11 | Char | | Custom Field (To be used if you have any data you want entered that is not in the above fields) |
| 26 | Custom_fld12 | Char | | Custom Field (To be used if you have any data you want entered that is not in the above fields) |
| 27 | Custom_fld13 | Char | | Custom Field (To be used if you have any data you want entered that is not in the above fields) |
| 28 | Custom_fld14 | Char | | Custom Field (To be used if you have any data you want entered that is not in the above fields) |
| 29 | Custom_fld15 | Char | | Custom Field (To be used if you have any data you want entered that is not in the above fields) |
| 30 | Custom_fld16 | Char | | Custom Field (To be used if you have any data you want entered that is not in the above fields) |
| 31 | Custom_fld17 | Char | | Custom Field (To be used if you have any data you want entered that is not in the above fields) |
| 32 | Custom_fld18 | Char | | Custom Field (To be used if you have any data you want entered that is not in the above fields) |
| 33 | Custom_fld19 | Char | | Custom Field (To be used if you have any data you want entered that is not in the above fields) |
| 34 | Custom_fld20 | Char | | Custom Field (To be used if you have any data you want entered that is not in the above fields) |

Within *Case_Records.xlsx*, there is an optional **MainPartyID** column that can be used to establish a relationship between cases and contacts by creating a reference to the **AlienID** column in *Contact_Record.xlsx*. You have two options:

- 1) Associate a "main contact" with each case during data import.
 - a. **AlienID** – for each contact, input unique identifier values (must be integers).
 - b. **MainPartyID** – for each case, input the contact's AlienID whom you would like to associate as the "main contact" for the case.
- 2) Do not associate a "main contact" with each case data import.
 - a. **AlienID** – leave this column blank.
 - b. **MainPartyID** – leave this column blank.

Note that "main contacts" of cases can later be added, changed, or removed from within the application. Please also note that regardless of if you choose option (1) or (2) above, in order to import case data, you must also import contact data.