



CRM-NOW

vtiger CRM

CSV Converter Mac OSX to vtiger CRM

Version 1.0.0.0

Preliminary note

The CRM system offers import- and export functions for exchanging data with the CRM. Hereby it uses the CSV format.

The comma-separated values (CSV) pseudo-file format is a set of file formats used to store tabular data in which numbers and text are stored in plain-text form that can be easily written and read in a text editor. In fact, because the goal of reading and writing the format take precedence over consistency, there effectively is no "CSV standard": only the understanding that plain text is delimited by a symbol. Traditionally, lines in the text file represent rows in a table, and commas separate the columns.

Because the files are usually text files, differences in encodings produce different binary files that may not be compatible with each other. Additionally, different CSV-like implementations frequently arise as the format is modified to handle richer table content such as allowing a different field separator character (necessary if numeric fields are written with a comma instead of a decimal point) or extensions to allow numbers, the separator character, or newline characters in text fields.

Despite these differences CSV remains a simple file format that is widely supported. Among its most common uses is to move tabular data between programs that naturally operate on a more efficient or complete proprietary format. For example: a CSV file might be used to transfer information from a database program to a spreadsheet.

Source: Wikipedia

Introduction

To process CSV-data on the Mac under OSX you need a spreadsheet application like Numbers.



Numbers is a spreadsheet application developed by Apple Inc. as part of the iWork productivity suite alongside Keynote and Pages. Numbers 1.0 was announced on August 7, 2007 and thus it is the newest application in the iWork Suite. Numbers runs on Mac OS X v10.4 "Tiger", Mac OS X v10.5 "Leopard", and Mac OS X v10.6 "Snow Leopard". On January 27th, 2010, Apple announced a new version of Numbers for iPad with an all new touch interface.

You can create a new Numbers spreadsheet by importing a document created in Microsoft Excel or AppleWorks 6. Numbers can also import files in comma-separated value (CSV) format, tab-delimited format, and Open Financial Exchange (OFX) format.

Source: Wikipedia

Problem

Unfortunately there is a problem with CSV-files which are generated using the Mac OSX. The generated CSV-files have a slightly different format than files are required by the CRM. As a result, the CRM is not able to process the Mac CSV-files directly.

To generate the correct CSV-format for the CRM, at first the Mac OSX CSV-files have to be converted to the correct format. For this purpose we offer the tool „OSX2MS-CSV“.



Operational description

The tool is designed as a so called „Droplet“. Under Mac OSX a droplet is a program, which will be run automatically, when you „Drag & Drop“ a file onto the droplet (icon of the tool). In our case, you just drag the CSV-file which is to be converted onto the droplet. The file then will be converted in a format, which the CRM is able to process and to import the data correctly.

An unmodified version of your CSV-file will be stored with a **.bak** extension in the same directory as your original CSV-file was located.

Please read the CRM manual available as Educational Ressource at vtiger's market place <http://vtiger.com/market-place> for a detailed description of the required CSV file format and the special formatting rules for field types.