

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](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\_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. 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	<b>Schema For Data Fields</b>				
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	AbrdCareOf	Char	50	Address Abroad - C/O
24	22	AbrdStr	Char	50	Address Abroad - Number & Street
25	23	AbrdApt	Char	10	Address Abroad - Apt #
26	24	AbrdCity	Char	40	Address Abroad - City
27	25	AbrdState	Char	20	Address Abroad - State
28	26	AbrdZip	Char	20	Address Abroad - ZIP Code
29	27	AbrdCountry	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	PPFxpireOn	Char	25	Passport - Expiration Date (mm/dd/yyyy)

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](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 you want to format a cell as a number, date, or other format, 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
VED		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.