

**PlanningPME**

Schedule easily

## Import fields

### I. Description of this feature

In order you not to enter your fields one by one, you can import fields from format text files ( files .txt).

Here are the fields that you can import:

- Clients: Society, Name, Address, Phone number...
- Tasks: Label, resources concerned, dates and hours, comments
- Unavailabilities: Label, resources concerned, dates and hours, comments

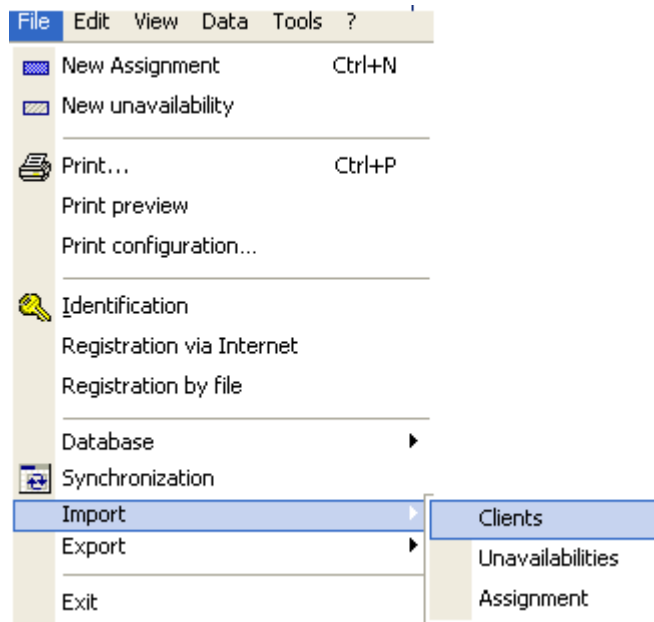
### II. How to import data with PlanningPME?

You can import your clients, tasks and unavailabilities from format Text files.

NB : To work with Excel files, you will have to convert your Excel files into format Text files first.



From PlanningPME, go to « Files » -> « Import »



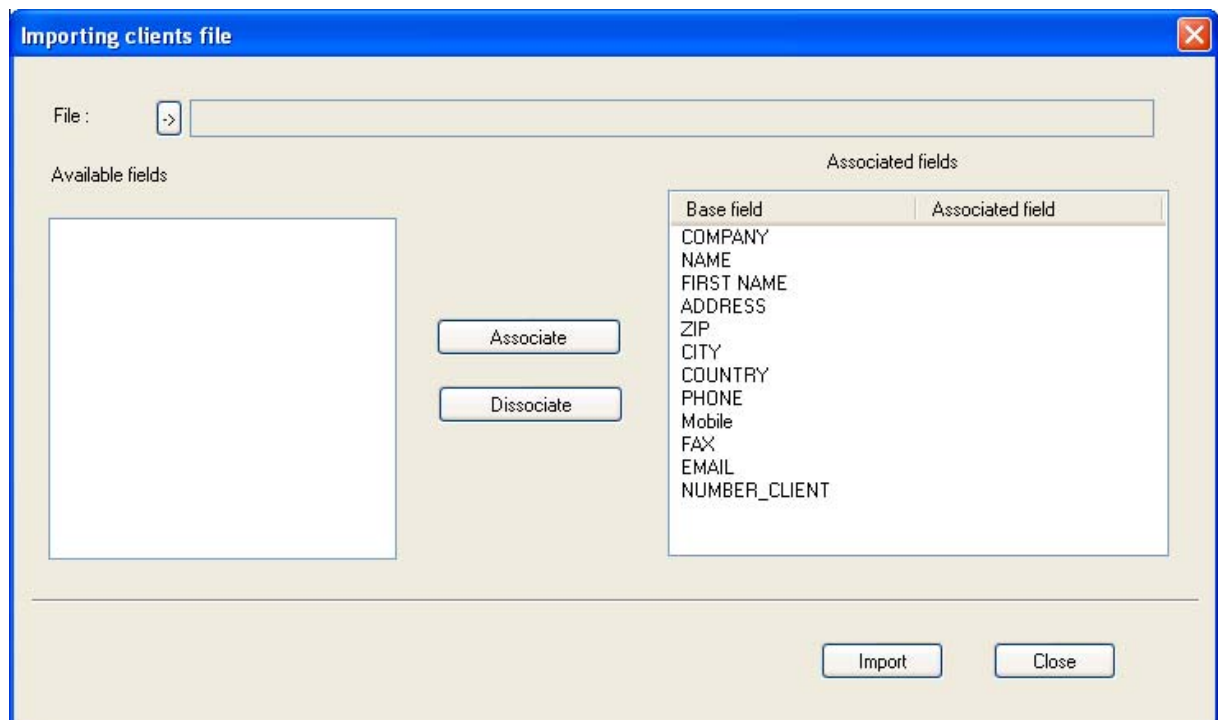
You can import your clients, your tasks or your unavailabilities.

## 1. Import clients

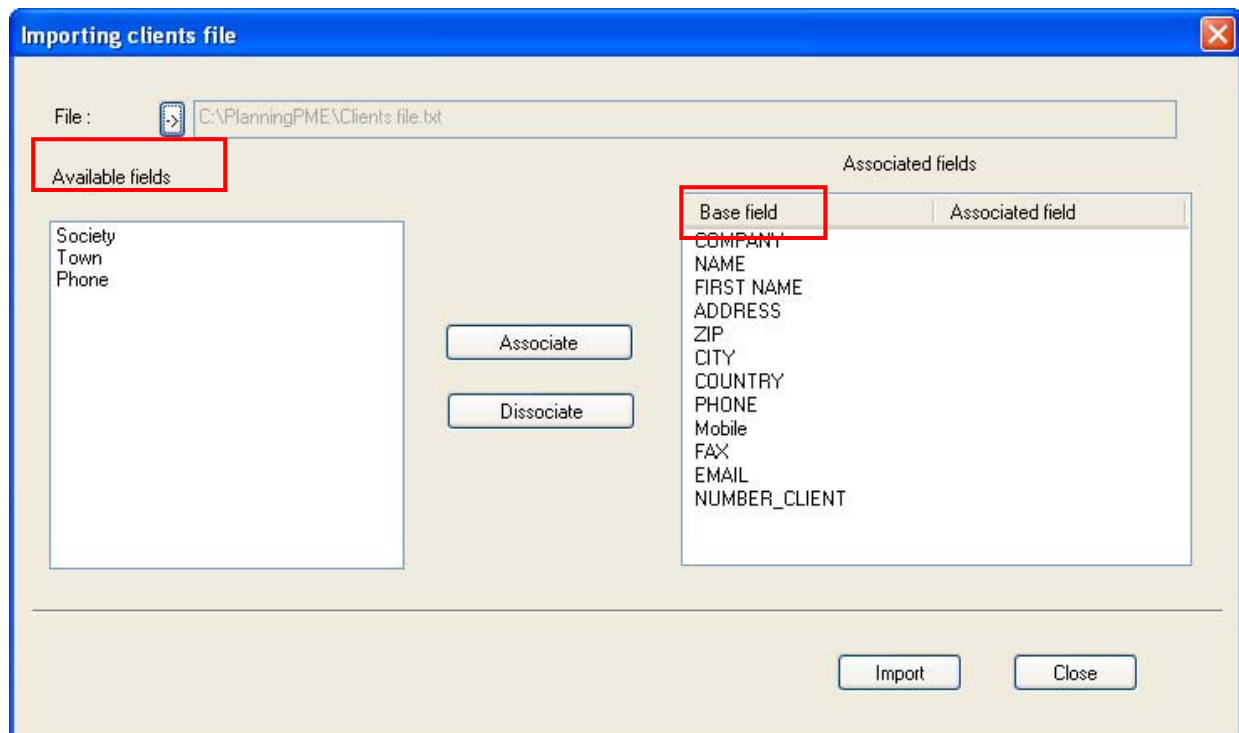
From PlanningPME, go to the menu « File » -> « Import » -> « Clients»

The following window appears.

Go and choose your format text file clicking on the arrow .



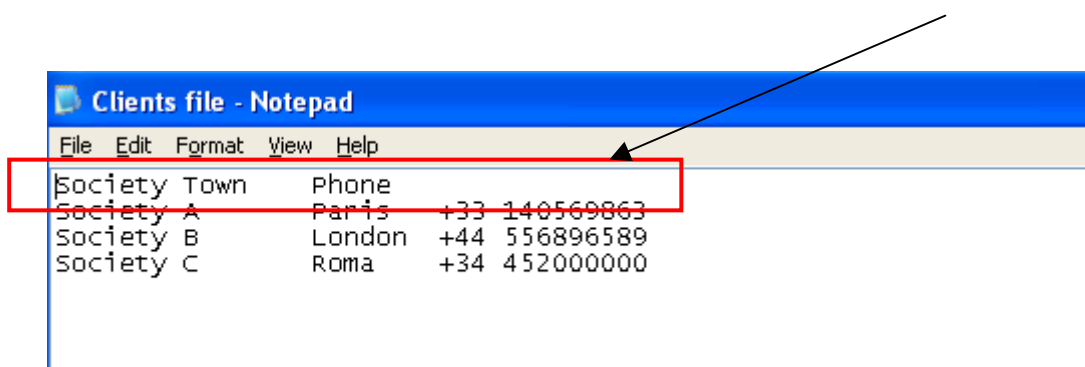
Then, associate your corresponding fields selecting the available fields on the left and the base field on the right side of the window.



Then, click on « Import ».

### → Example of clients import

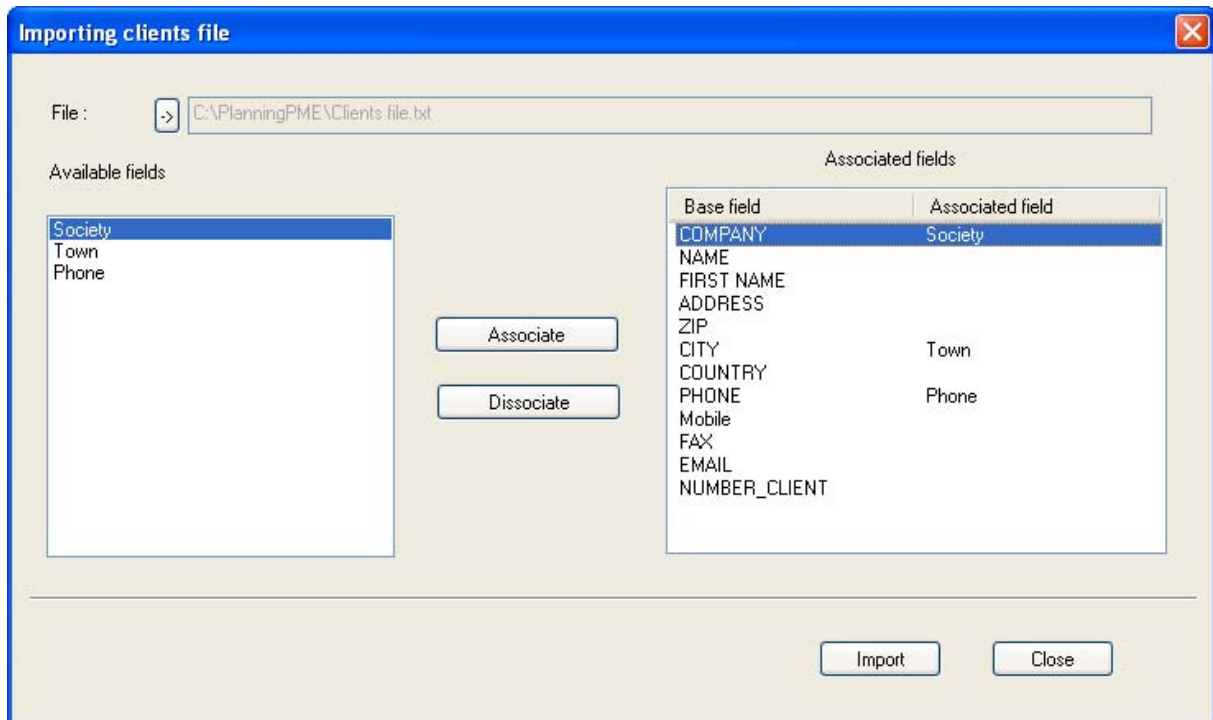
Here is an example of format Text file with three files: Society, Town and Phone.



We are going to import it in PlanningPME.



So, we associate the corresponding fields (For example, the available field "Society" on the left deals with the base field "Company" on the right).

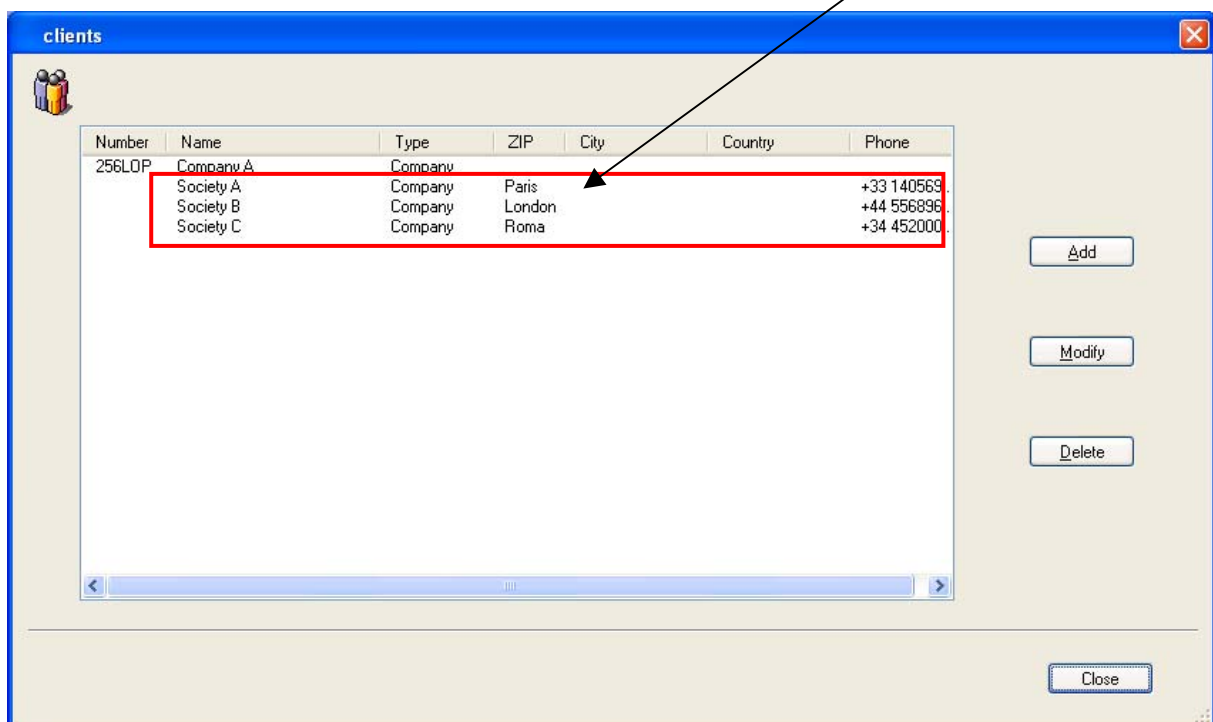


Once all your fields associated, click on the button « Import ».

### Visualization of the import on PlanningPME.

Go to the menu "Data" -> "Clients"

Your clients have been imported !





## 2. Import tasks and unavailabilities

The set up to import tasks and unavailabilities is more complicated than for clients. Indeed, your format text file must have a defined format.

Tasks will be created automatically on your schedule if your text file is on the good format.

Format type of your Text file:

N°	Nom_tâche	Date_début	date_fin	Noms_ressources	Remarques
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For more information on this type of information, feel free to contact us.

### III. Contact PlanningPME

For any help or information about the software PlanningPME, the team of TARGET SKILLS is at your entire disposal.

#### PlanningPME

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<http://www.planningpme.net>

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