

# SMART IMPORT DETAILS

This document provides the column header descriptions and data requirements for resident, staff and connection Smart Import .CSV files.



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# SMART IMPORT DETAILS

## RESIDENT IDENTIFIER ORDER

In order for ongoing Smart Imports to be accurate, the system matches data from the Smart Import file to data in existing user profiles in your LifeLoop site. If your community plans to continually utilize the Smart Import feature, we recommend your users have unique External IDs to avoid creating duplicate or inaccurate profiles. The Resident Smart Import will attempt to match unique identifiers in this order:

- 1 EXTERNAL ID**
- 2 USERNAME**
- 3 FIRST NAME, LAST NAME & DATE OF BIRTH**

# SMART IMPORT DETAILS

## RESIDENT IMPORTS



### FIRST NAME\*

Resident's first name. We recommend this match internal resident files.

***Not case sensitive, but enter the field value exactly how you would like it to appear in LifeLoop. Letters, numbers, spaces and special characters are accepted.***



### LAST NAME\*

Resident's last name. We recommend this match any internal resident files.

***Not case sensitive, but enter the field value exactly how you would like it to appear in LifeLoop. Letters, numbers, spaces and special characters are accepted.***



### PREFERRED NAME

If a resident prefers to go by a name other than their First Name. Preferred name will automatically appear in quotation marks in resident list.

***Not case sensitive, but enter the field value exactly how you would like it to appear in LifeLoop. Letters, numbers, spaces and special characters are accepted.***



**Barbara "Barb" Stevenson**  
Unit (78)

*\*This field is required when performing a Smart Import.*

*Note: Commas should never be used in any Smart Import field.*

# SMART IMPORT DETAILS

## RESIDENT IMPORTS



### DATE OF BIRTH

The date of birth is tied to notifications for staff and to the Birthday Component in any Designer project. We strongly encourage this be included on all Smart Import files.

**Format: MM/DD/YYYY**

*\*This field is required when performing a Smart Import.  
Note: Commas should never be used in any Smart Import field.*

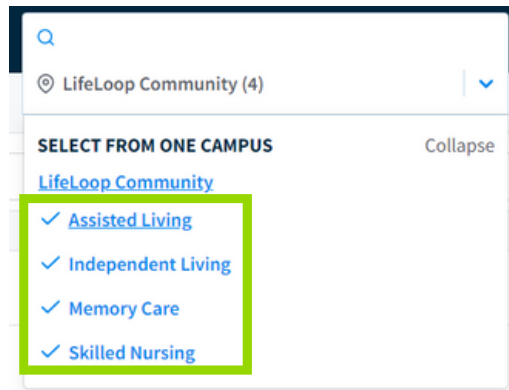
# SMART IMPORT DETAILS


## RESIDENT IMPORTS



### COMMUNITY\*

The community name or community External ID for the LifeLoop community where the resident lives. The Community Name is found in the Global Selector.



The community External ID is found under Manage Settings. Click on the  to access Manage Settings.

**Letters, numbers, spaces and special characters are accepted. Community External ID is case sensitive.**

*\*This field is required when performing a Smart Import.*

*Note: Commas should never be used in any Smart Import field.*

# SMART IMPORT DETAILS

## RESIDENT IMPORTS



### EMAIL

Do not put a fake email address or an email address that belongs to anyone besides the resident in this field. LifeLoop Welcome Emails and notifications are sent this email. Residents can use this email as their username and to receive reset password requests.

***Not case sensitive, but enter the field value exactly how you would like it to appear in LifeLoop. Letters, numbers, spaces and special characters are accepted.***



### USERNAME

Residents can use this to login into the LifeLoop system and access their profile. If an email isn't provided, LifeLoop will automatically populate a Username during a Smart Import.

***Field is unique to the staff member and case sensitive, but enter the field value exactly how you would like it to appear in LifeLoop. Letters, numbers, spaces and special characters are accepted.***

*\*This field is required when performing a Smart Import.*

*Note: Commas should never be used in any Smart Import field.*

# SMART IMPORT DETAILS

## RESIDENT IMPORTS



### PHONE

This number will import to the Phone field under the Profile tab. This number is visible in the Resident Directory if the resident hasn't opted out of the directory. It may be a landline or mobile device. If this is a mobile device number, it's utilized for text notifications *unless* a different number is in the Text Number field in the Notifications tab.

***Format: (111) 000-4444 or 9995550000 or 444-555-9999***

*\*This field is required when performing a Smart Import.*

*Note: Commas should never be used in any Smart Import field.*



# SMART IMPORT DETAILS

## RESIDENT IMPORTS



### TEXT PHONE

This number will import to the Notifications tab. This number will not appear anywhere else in LifeLoop.

**Format: (111) 000-4444 or 9995550000 or 444-555-9999**

#### Edit Resident

[← back to Alex](#)

Profile  
Additional  
Attachments  
**Notifications**  
Account



Text notifications may be sent to an alternate phone number, instead of the number listed in the profile settings. This phone number will not be displayed or shared elsewhere on the platform.

#### Text Phone

(xxx) xxx-xxxx



### EXTERNAL ID

Unique identifier used to help match imported data with existing LifeLoop resident users. We strongly encourage this field be completed. If the resident has an ID of any kind at your community, we recommend that ID be used in this field. If this is left blank, LifeLoop will attempt to match based on other unique identifiers (See 'Resident Identifier Order' on page 2 for more information).

**Field is unique to the resident and case sensitive.**

**Enter the field value exactly how you would like it to appear in LifeLoop. Letters, numbers, spaces and special characters are accepted.**

*\*This field is required when performing a Smart Import.*

*Note: Commas should never be used in any Smart Import field.*

# SMART IMPORT DETAILS

## RESIDENT IMPORTS



### STATUS

Current status of the resident at your community. If the resident has an existing profile in LifeLoop, the status will be updated to reflect the most recent Smart Import. If this field is blank, an existing status will not be changed in LifeLoop.

**Entry Options: Active, Inactive, Deleted, OnLeave**

**Not case sensitive. 'Deleted' will permanently remove the resident from your LifeLoop site.**



### UNIT

Resident's room, apartment or unit number at the community.

**Not case sensitive, but enter the field value exactly how you would like it to appear in LifeLoop. Letters, numbers, spaces and special characters are accepted.**



### GENDER

If field is left blank, gender will default to 'other' in the Resident Profile.

**Entry Options: Male, Female, Other**

**Not case sensitive.**

*\*This field is required when performing a Smart Import.*

*Note: Commas should never be used in any Smart Import field.*

# SMART IMPORT DETAILS

## RESIDENT IMPORTS



### MOVE IN DATE

Date the resident moved into a community or campus.

**Format: MM/DD/YYYY**



### ANNIVERSARY

Wedding anniversary of resident and their spouse/partner.

**Format: MM/DD/YYYY**



### VETERAN

Resident veteran status. Enter 'TRUE' to check the Veteran checkbox in the resident profile. Enter 'false' to uncheck the Veteran checkbox in a resident profile. If the field is left blank the Veteran checkbox will not be checked.

**Entry Options: True, False**

**Not case sensitive but Excel will most likely automatically capitalize these in a .CSV file.**



### VETERAN BRANCH

Veteran's military branch.

**Not case sensitive, but enter the field value exactly how you would like it to appear in LifeLoop. Letters, numbers, spaces and special characters are accepted.**

*\*This field is required when performing a Smart Import.*

*Note: Commas should never be used in any Smart Import field.*

# SMART IMPORT DETAILS

## RESIDENT IMPORTS



### GROUPS

Groups are great for communication via announcements as well as a way to filter a group of residents to view.

***Field is case sensitive. If the Group doesn't exist in LifeLoop, enter the field value how you would like it to appear in LifeLoop. Letters, numbers, spaces and special characters are accepted.***

*\*This field is required when performing a Smart Import.  
Note: Commas should never be used in any Smart Import field.*

# SMART IMPORT DETAILS

## STAFF IDENTIFIER ORDER

In order for ongoing Smart Imports to be accurate, the system matches data from the Smart Import to data in existing user profiles in your community's LifeLoop site. If your community plans to continually utilize the Smart Import feature, we recommend your Staff users have unique External IDs to avoid creating duplicate or inaccurate profiles. The Staff Smart Import will attempt to match unique identifiers in this order:

- 1 **EXTERNAL ID**
- 2 **EMAIL**
- 3 **USERNAME**
- 4 **FIRST NAME, LAST NAME & DATE OF BIRTH**

# SMART IMPORT DETAILS

## STAFF IMPORTS



### FIRST NAME\*

Staff member's first name. We recommend this match internal staff files.

***Not case sensitive, but enter the field value exactly how you would like it to appear in LifeLoop. Letters, numbers, spaces and special characters are accepted.***



### LAST NAME\*

Staff member's last name. We recommend this match any internal staff files.

***Not case sensitive, but enter the field value exactly how you would like it to appear in LifeLoop. Letters, numbers, spaces and special characters are accepted.***



### TITLE

Staff member's job title. This is displayed in the staff list. If the staff member has the 'Message Family/Residents' permission, the title will be visible in the Resident Directory and to Residents and Connections in the Message feature.

***Not case sensitive, but enter the field value exactly how you would like it to appear in LifeLoop. Letters, numbers, spaces and special characters are accepted.***

*\*This field is required when performing a Smart Import.*

*Note: Commas should never be used in any Smart Import field.*

# SMART IMPORT DETAILS

## STAFF IMPORTS



### DATE OF BIRTH

This will import to the Staff Profile. This field is not required but we strongly encourage it be accurately completed on all Smart Imports.

***Format: MM/DD/YYYY***

*\*This field is required when performing a Smart Import.*

*Note: Commas should never be used in any Smart Import field.*

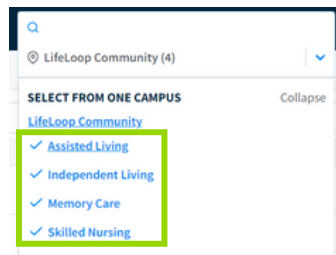
# SMART IMPORT DETAILS


## STAFF IMPORTS



### COMMUNITIES\*

The community name or community External ID of the LifeLoop communities the staff member will need access to. The community name is found in the Global Selector.



The community External ID is found under Manage Settings. Click on the  to access Manage Settings.

If a Staff member needs access to more than one community, separate the community names or External IDs with a backslash "/".

- **Letters, numbers, and spaces are accepted. Special characters are not recommended.**
- **Community External ID is case sensitive.**

*\*This field is required when performing a Smart Import.*

*Note: Commas should never be used in any Smart Import field.*



# SMART IMPORT DETAILS

## STAFF IMPORTS



### EMAIL

Do not put a fake email address or an email address that belongs to anyone besides the staff member in this field. LifeLoop Welcome Emails and notifications are sent this email. A staff member can use this email to log into LifeLoop and receive reset password requests.

***Field is unique to the staff member. Not case sensitive, but enter the field value exactly how you would like it to appear in LifeLoop. Letters, numbers, spaces and special characters are accepted.***



### USERNAME

A staff member can use this to log into LifeLoop. If an email isn't provided, LifeLoop will automatically populate a Username during a Smart Import. A specific Username will be accepted if it's not already associated with an existing LifeLoop user.

***Field is unique to the staff member and case sensitive, but enter the field value exactly how you would like it to appear in LifeLoop. Letters, numbers, spaces and special characters are accepted.***

*\*This field is required when performing a Smart Import.*

*Note: Commas should never be used in any Smart Import field.*

# SMART IMPORT DETAILS

## STAFF IMPORTS



### PHONE

This number will import to the Phone field under the Profile tab. This number is visible in the Resident Directory if the staff member has the 'Message Family/Residents' permission. It may be a landline or mobile device. If this is a mobile device number, it's utilized for text notifications, *unless* a different number is in the Text Number field in the Notifications tab.

***Format: (111) 000-4444 or 9995550000 or 444-555-9999***



### TEXT PHONE

This number will import to the Notifications tab and will not appear anywhere else in LifeLoop.

***Format: (111) 000-4444 or 9995550000 or 444-555-9999***



### ROLE

This decides what permissions staff members has in LifeLoop. See the ***Staff Permissions by Role*** document in the Learning Community for details. If this field is left empty, the staff member will not have the ability to access most of the community's LifeLoop site.

***Entry Options (case sensitive): Activity Assistant, Activity Director, Admin, Dining, Director of Nursing, Front Desk, Marketing Director, Med Tech, Transportation, Work Request Tech***

*\*This field is required when performing a Smart Import.*

*Note: Commas should never be used in any Smart Import field.*

# SMART IMPORT DETAILS

## STAFF IMPORTS



### PERMISSIONS

If you'd like to create a custom Role with specific permissions, contact LifeLoop Customer Support or your Customer Relationship Manager for assistance.



### EXTERNAL ID

A unique identifier used to help match imported data with existing LifeLoop staff users. We strongly encourage this field be completed. If the staff member has an ID of any kind at your community, we recommend that ID be used in this field. If this is left blank, LifeLoop will attempt to match based on other unique identifiers (See 'Staff Identifier Order' on page 9 for more information).

***Field is unique to the resident and case sensitive.***

***Enter the field value exactly how you would like it to appear in LifeLoop. Letters, numbers, spaces and special characters are accepted.***

*\*This field is required when performing a Smart Import.*

*Note: Commas should never be used in any Smart Import field.*

# SMART IMPORT DETAILS

## STAFF IMPORTS



### STATUS

Current status of the staff member at your community. If the staff member already has a profile in the community, the status will be updated to reflect the most recent Smart Import. If this field is blank, the status will not change in the Staff Profile.

***Entry Options: Active, Deleted***

***Not case sensitive. 'Deleted' will remove the staff from your LifeLoop site and their profile will no longer be accessible***



### GENDER

If field is left blank, gender will default to 'Other' in the Staff Profile.

***Entry Options: Male, Female, Other***

***Not case sensitive.***



### GROUPS

Groups are great for communication via announcements as well as a way to filter a group of staff to view. Must be existing Groups in LifeLoop.

***Field is case sensitive. If the Group doesn't exist in LifeLoop, enter the field value how you would like it to appear in LifeLoop. Letters, numbers, spaces and special characters are accepted.***

*\*This field is required when performing a Smart Import.*

*Note: Commas should never be used in any Smart Import field.*

# SMART IMPORT DETAILS

## CONNECTION IDENTIFIER ORDER

In order for ongoing Smart Imports to be accurate, the system matches data from the Smart Import to data in existing user profiles in your community's LifeLoop site. If your community plans to continually utilize the Smart Import feature, we recommend your Connection users have unique External IDs to avoid creating duplicate or inaccurate profiles. The Connection Smart Import will attempt to match unique identifiers in this order:

**1****EXTERNAL ID****2****EMAIL****3****FIRST NAME & LAST NAME**

# SMART IMPORT DETAILS

## CONNECTION IMPORTS



### FIRST NAME\*

Connection's first name. We recommend this match internal connection files.

***Not case sensitive, but enter the field value exactly how you would like it to appear in LifeLoop. Letters, numbers, spaces and special characters are accepted.***



### LAST NAME\*

Connection's last name. We recommend this match internal connection files.

***Not case sensitive, but enter the field value exactly how you would like it to appear in LifeLoop. Letters, numbers, spaces and special characters are accepted.***



### EMAIL

Do not put a fake email address or an email address that belongs to anyone besides the connection in this field. LifeLoop Welcome Emails and notifications are sent this email. Connections can use this to log into LifeLoop and to receive reset password requests.

***Must be unique to the Connection. Not case sensitive, but enter the field value exactly how you would like it to appear in LifeLoop. Letters, numbers, spaces and special characters are accepted.***

*\*This field is required when performing a Smart Import.*

*Note: Commas should never be used in any Smart Import field.*

# SMART IMPORT DETAILS

## CONNECTION IMPORTS



### PHONE

This number will import to the Phone field in the Connection profile. This number is visible to staff that have the required permission and the resident their connected to in LifeLoop. It may be a landline or mobile device. If this is a mobile device number, it's utilized for text notifications, *unless* a different number is noted in the Text Number field in the Notifications tab. Only the Connection can add a Text Number to their profile.

***Format: (111) 000-4444 or 9995550000 or 444-555-9999***

*\*This field is required when performing a Smart Import.*

*Note: Commas should never be used in any Smart Import field.*

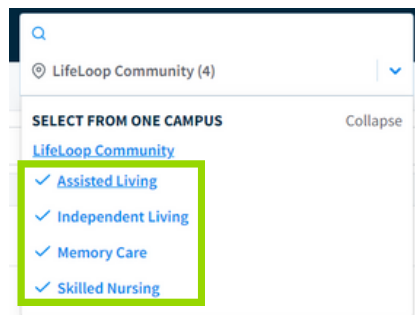
# SMART IMPORT DETAILS

## CONNECTION IMPORTS

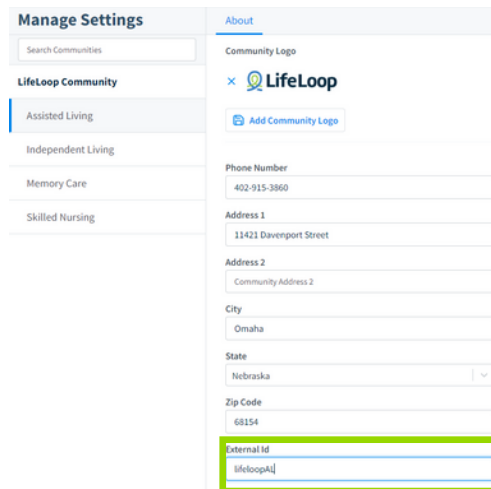


### COMMUNITIES\*

The community name or community External ID of the LifeLoop community(ies) where the connection is associated. This field is only necessary when the connection is a Community Connection. The community name is found in the Global Selector.



The community External ID is found under Manage Settings. Click on the  to access Manage Settings.



**If a Community Connection is associated to more than one community, separate the community names or External IDs with a backslash "/".**

**Letters, numbers, spaces and special characters are accepted. Community External ID is case sensitive.**

*\*This field is required when performing a Smart Import.*

*Note: Commas should never be used in any Smart Import field.*



# SMART IMPORT DETAILS

## CONNECTION IMPORTS



### EXTERNAL ID

A unique identifier used to help match imported data with existing LifeLoop connection users. We strongly encourage this field be completed. If the connection has an ID of any kind at your community, we recommend that ID be used in this field. If this is left blank, LifeLoop will attempt to match based on other unique identifiers (See 'Connection Identifier Order' on page 9 for more information).

***Field is unique to the connection and case sensitive. Enter the field value exactly how you would like it to appear in LifeLoop. Letters, numbers, spaces and special characters are accepted.***



### RELATIONSHIP

Relationship to the resident listed. If the Connection is a Community Connection or the Relationship to the resident is unknown, leave this field blank.

***Not case sensitive, but enter the field value exactly how you would like it to appear in LifeLoop. Letters, numbers, spaces and special characters are accepted.***

*\*This field is required when performing a Smart Import.*

*Note: Commas should never be used in any Smart Import field.*

# SMART IMPORT DETAILS

## CONNECTION IMPORTS



### RESIDENTS

The resident(s) the connection is associated with in LifeLoop. LifeLoop will attempt to match by resident name (first name and last name only) or resident external ID.

***Not case sensitive but spelling should match resident name or resident external ID. Letters, numbers, spaces and special characters are accepted.***



### GROUPS

Groups are great for communication via announcements as well as a way to filter a group of connections to view. Must be existing Groups in LifeLoop.

***Field is case sensitive. If the Group doesn't exist in LifeLoop, enter the field value how you would like it to appear in LifeLoop. Letters, numbers, spaces and special characters are accepted.***

*\*This field is required when performing a Smart Import.*

*Note: Commas should never be used in any Smart Import field.*

# SMART IMPORT DETAILS

## CONTINUED LEARNING



### ATTEND A UNIVERSITY COURSE

Don't forget about our complimentary LifeLoop University available to you and your team. Courses are provided weekly and cover all LifeLoop features. Emails with the topics and schedules are sent out monthly for you to register to attend.



### VISIT THE LEARNING COMMUNITY

Access LifeLoop marketing collateral and training resources at your convenience.

Find the Learning Community by clicking the "?" on the top right-hand side of your screen or going to

<https://ourlifeloop.com/training/staff> (password: intheloop)



### FURTHER QUESTIONS?

Reach out to [support@ourlifeloop.com](mailto:support@ourlifeloop.com) or your Customer Relationship Specialist.