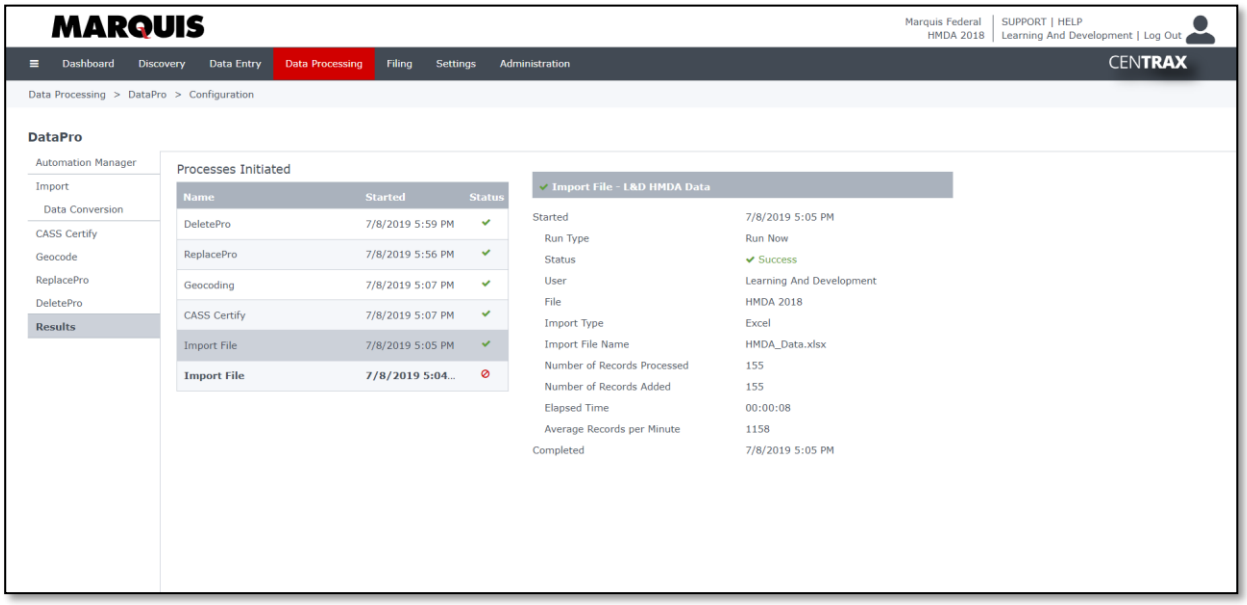
MARQUIS

CNX601	DataPro – Importing A CenTrax File
	The Import section is used to define import layouts that associate fields from certain file formats or another CenTrax file. The following process outlines how to import into a file from another CenTrax file.
Order of Steps	**Tasks**
Step 1	Log into **Marquis Next**
Step 2	Click the ☰ and click on **CenTrax**
	The active **Institution** and **File** will display in the upper right-hand section to the left of the name of the user logged in.
Step 3	Click **Data Processing**
Step 4	Click **DataPro**
Step 5	Click **Import**
	Any Import Definitions that have already been created will be listed under the **Import Job Name** list
Step 6	To create a new import definition, click the green **Add New** button
6.1	Type in the **Name** of the import definition
6.2	Select CenTrax File within the **File Format** selections
	• Double click the desired CenTrax files to be imported or merged together
Step 7	Choose to Enable or Disable the following:
	• **Include Zero Balance**: If a record has a zero balance and this is disabled, the record will not come in
	• **Allow Duplicate Accounts**: if enabled, existing records will NOT be updated and will simply be re-added.
Step 8	Select **Match Records by** (this option will be available ONLY if Allow Duplicate Accounts is disabled)
	• Acct# + Branch + Acct Type
	• Acct# + Acct Type
	• Acct # Only
	• Acct# + Loan#
	• ULI Only
	• ULI + Acct#
	• ULI + Action Date
	• ULI + Action Code
	• ULI + Action Code + Action Date
Step 9	Enable or disable **Update Existing Records**
9.1	If enabled, place a check mark in the following field groups to be updated:
	• Address
	○ Exceptions Only
	○ Only if address is different
	• Geocode
	○ Import new geocode from file
	○ Clear geocode
	• Balance Fields
	• HMDA Fields
	• CRA Fields
	• Fair Lending Fields
	• User-defined Fields
	• All Other Fields

Step 10	Click **Create** to establish the import definition
Step 11	To run the Import Definition immediately, click the **Run Now** button located in the upper right hand corner of the import specification window
Step 12	When the process is complete, a notification will pop up
Step 13	To see results, click on the **Results** DataPro menu option located on the left hand side of the page