

## A Guide to Working With Your Data In FastSite

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### Overview

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FastSite gives you two different methods for entering data into your list. You can either manually enter each record or you can import your data from a spreadsheet, database, or text file. In either case, you need to operate on your list. To do that:

1. Select **Your Lists** from the navigation bar at the top of the page.



2. All of your lists will appear, each with a separate toolbar. To select a specific list to operate on, just click on its name.
3. Click on **Add/Edit Data** from the selected list's toolbar.

★ distributors



At this point, FastSite gives you choices of manually adding entries or of importing your data. Once your data is in FastSite, you can always choose to export your data as either a text file (.txt) or as a Comma Separated Value (.csv) file that is used by many databases and spreadsheets, such as Excel. This allows you to easily maintain or update your data in the future.

### Manually Entering Your Data

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If you do not have a large number of locations and decide to manually enter them into FastSite, you can do so as follows:

1. Click **Add Entry** on the selected lists's toolbar as shown below.

★ distributors



A form will appear with type-in boxes for each field.

2. Enter the appropriate data in each field on the form. An example of a valid record is shown below. Please keep in mind that you will only see all of the fields if you are a FastSite Gold customer and

have the images upgrade. A complete description of what should appear in each field is presented in the next section, Manual Data Entry Fields.

### Record 1 of 6

Name	<input type="text" value="BC Hydro Supply"/>	?
Address	<input type="text" value="42 Dunsmuir St"/>	?
Address	<input type="text" value="11th Floor"/>	?
City, State/Province	<input type="text" value="Vancouver, BC"/>	?
Zip or Postal Code	<input type="text" value="V6B 5R3"/>	?
Phone	<input type="text" value="(800) 214-9771"/>	?
Notes	<input type="text" value="Contractors Only&lt;br/&gt;M-F 7:00AM - 4:00PM&lt;br/&gt;Sa 7:00AM - 12:00 NOON"/>	?
Web Page	<input type="text" value="www.bchydrosupply.bc.ca"/>	?
Image	<input type="text" value="bchydro.jpg"/>	?
Attribute Codes <a href="#">(click to edit)</a>	<input type="text" value="a,c"/>	?
<input type="button" value="OK"/> <input type="button" value="Cancel"/>		

3. Click the **OK** button at the bottom of the page to store the entry. Then, repeat Steps 1-3 for each additional entry.

## Manual Data Entry Fields

### Name

Enter or modify the name of your store/distributor/member/etc. The name can be up to 64 characters in length.

### Address

Enter or modify the address for your store/distributor/member/etc. The address may be one or two lines (there are two address fields). Each line can be up to 64 characters in length. If your address is only one line, just leave the second line blank.

### City, State/Province

For U.S. addresses, enter or modify the city name followed by a comma and then followed by the state name or two letter abbreviation. An example is: *Pittsburgh, PA*. For Canadian addresses, enter or modify the city name followed by a comma and then followed by the two letter province abbreviation. An example is: *Vancouver, BC*. The entire line can be up to 64 characters in length.

### Zip or Postal Code

For U.S. addresses, enter or modify the five digit zip code for the location. If you know the nine digit zip code you can enter it provided it is in the following format: #####-####. Currently, FastSite ignores the four digit extension in its search for the nearest location. An example of the recommended format is: *15143*. For Canadian addresses, enter the postal code. The postal code must be in upper case with one space

between the first three and last three characters. (Note that FastSite will also handle postal codes without a space for convenience.) An example of the recommended format is: *V6B 5R3*.

### **Phone**

Enter or modify the phone number for the location. The phone number can be in any of the following formats:

(###) ###-#### or  
###-###-#### or  
###-###-####

### **Notes**

Use the Notes field to enter or modify any additional information that you wish to display to your customers. Often Notes convey information such as hours of operation for commercial customers or areas of expertise for professional organizations or additional contact methods such as Fax numbers and 800 numbers. While entering the text, the window will display three lines at any one time. When the information is displayed to your customer in the results grid, the complete text will appear.

### **Web Page**

Enter or modify this field to contain a valid URL for the web page to which you want to link this result. This is particularly useful when each store or location has its own web page. Preferred formats include:  
<http://www.yoursite.com> or  
[www.yoursite.com](http://www.yoursite.com) or  
any valid address

### **Image (Only available to FastSite Gold accounts with the Images upgrade)**

Add or modify this field to contain the name of the image to be displayed with this result. The image must be a JPEG or GIF file and its name may not contain spaces. Examples of valid names are:

NEregion1.jpg or  
SEregion4.gif

If the name is misspelled or incorrect in any way, FastSite will not display the image. You must ensure that the proper image is specified and associated with the appropriate record. (You use the FastSite Image Manager to upload your images; here you are only associating a particular image with a particular record.)

### **Attribute Codes (Only available to FastSite Gold accounts)**

Search attributes can be used in two ways. The first way is to define regional sales or distribution territories. The second way is to use attributes of a location to further narrow the geographic search. You enter the appropriate attribute code according to the behavior you intend. Both methods are described below.

#### **Using Attributes to Define Territories**

This allows you to direct your customers to the nearest distributor or sales representative. For U.S. locations, you accomplish this by entering the state and/or counties within states (i.e., the territories) into the Attribute Codes field for each dealer. For Canadian locations, you use the province name as the territory. Then, when a customer enters a zip code or city/state into the locator, the dealer record containing that category will be displayed. For example, if Dealer4 covers the state of NY and one county in Massachusetts, the attributes for his record may be: `ny,ma:middlesex`. In Canada, if DealerCN4 covers the provinces of Ontario (ON) and British Columbia (BC), then the attributes for his record are: `on,bc`.

Attributes used to define territories must be a comma separated list (without spaces after the comma) in either of the following formats:

**state abbreviation** (for the entire state) (i.e. *MS*)

or

**state abbreviation:county name** (for the county within the state)(i.e. *MS:ADAMS*)

or

**province abbreviation** (for Canadian locations)

For multiple counties or states, use a comma separated list as shown in this example:

MA:MIDDLESEX, MA:SUFFOLK, CT

(In the above example, the territory includes two counties in Massachusetts and the entire state of Connecticut.)

If you decide to use territories, you must either define a dealer for all possible territories (ideally) or you can define some dealers with territories and a single dealer, perhaps with company information, with no attributes. Then, if a customer enters a zip code that doesn't appear in a defined territory, the default record (the one with no attributes) is displayed. If you do not create a default record and you omit a territory (a single county or state or province) and a customer enters a zip code in that omitted territory, then an error message will be displayed to your customer. FastSite provides a complete list of states and corresponding county names as well as province names at: <http://fastsite.com/help/countyList.txt> to help you.

### **Using Attributes to Further Narrow the Search**

You can also use attributes to allow your customers to further restrict their geographic search by the specific attributes of the locations nearest to them. The attribute codes are the very short internal names that are associated with the attribute names that appear to your customers. In this field, you should enter the internal attribute code or codes required for this record, such as:

*a, c*

For example, paint stores may have attributes of *paint*, *wallpaper*, and *stain*, each of which is associated with an internal attribute code, such as *a*, *b*, and *c*, respectively. In this field, you would specify one or more attribute codes, such as: *a, c*. If more than one attribute code applies to this record, then the list of attribute codes must be separated by commas.

If you intend to use attributes in this way, you must remember to define the attributes by clicking the **click to edit** link beneath the **Attribute Codes** field. This will take you to a screen whereby you can associate attribute names (like *paint*, *wallpaper*, and *stain*) with internal attribute codes (*a*, *b*, and *c*). Later, when you start designing your results page, you will choose how you want the attributes to be displayed to your customer (either as a series of checkboxes or in a multi-click dropdown menu).

## Importing Your Data

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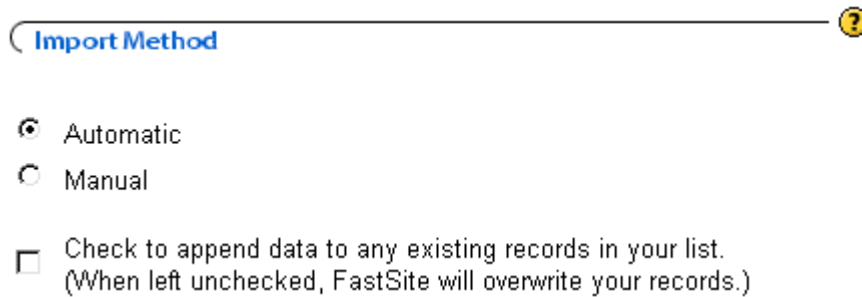
If you have a large number of locations that are stored in a database, spreadsheet, or text file, you can import them into FastSite as follows:

1. Click **Import Your Data** on the selected list's toolbar as shown below.



A page will appear with your importing options.

2. Select the desired *Import Method* from the choices that appear as shown below.



Choose either **Automatic**, in which case FastSite tries to determine which fields are present in your data text file, or **Manual** to explicitly tell FastSite what fields are present. We strongly recommend that you try **Automatic** first and see how it goes. For a detailed description of the text formats that FastSite handles, see the Data Importing Formats section below.

Then, if you aren't satisfied with the results using **Automatic**, click **Manual**. In **Manual** mode, FastSite relies on you to indicate which fields are present in your data by specifying the fields in the *Field Options for Manual Importing* section (which follows this *Import Method* section on the same page).

With whatever Import Method you choose, you need to tell FastSite what to do with the data that it imports. Check the **Check to append data to any existing records in your list** box to specify that the imported data will be appended to the end of any existing records in your list. If you do not check this box, FastSite will overwrite whatever data may be in your list with the new data it is importing.

3. If you decide to use the **Manual** import method, proceed to the *Field Options for Manual Importing* section and then check the boxes for all fields that correspond to the data in your file as shown below.

## Field Options For Manual Importing

For manual importing of your data **only**, select which fields are present in your table

- Name
- Address
- Phone
- Web Page URL
- Other Notes

By doing this, you are telling FastSite to explicitly look for those fields in your data. If you are not using the **Manual** import method, skip this step and proceed to Step 4.

4. In the *Select Source File* section, specify the file that contains your data using the **Browse...** button. This is the file that FastSite will use for importing your data. FastSite attempts to read the data out of any file that you specify. If it is unable to do so, it will display an error message indicating a problem. For best results, the data in your text file must be in one of the many formats that FastSite supports (see the [About CSV Files and Spreadsheets](#) and [About Text Importing Formats](#) sections).

The text file you provide contains the data that will be used by FastSite to return the results of zip code searches to your customers. This file will be stored in a secure location on the FastSite server and accessible only through your account under password control. Remember that the data you import will either be appended to your existing data (if there is any) or will overwrite the existing data depending on whether or not you checked the **Check to append data...** check box under the *Import Method* section.

5. FastSite will expect that your file is a text file (.txt), unless you specify that the file is in CSV format (comma delimited). Once the appropriate file is specified, click the **OK** button and FastSite will begin the import process.

FastSite will display a page that provides you with immediate feedback on how your data is being interpreted during the import. For a text file, the page displayed will show you how the data is being interpreted. If there is a problem, edit your text file and try the import process again. Wait to click the **OK** button until you are ready for FastSite to import your file. An example of the page displayed for a text file appears below.

File name:	C:\fastsite\dataGuide\powersrc-dist.txt
File size:	659 bytes
Number of records found:	5
First record found:	BC Hydro 42 Dunsmuir St 11th Floor  phone: (800) 214-9771 url: http://www.bchydrosupply.bc.ca notes: Contractors Only M-F 7:00AM - 4:00PM Sa 7:00AM - 12:00 NOON
Last record found:	Duke Energy 1489 New Wal kertown Rd  Winston Salem, NC 27101-3319 phone: (336) 721-0975 url: http://www.dukeenergy.com notes:

For a CSV file, the page displayed provides immediate feedback on how the data is interpreted; additionally, this page allows you to tell FastSite what kind of data is present in a specific field by selecting that field from the dropdown list of choices. Once you have finished reviewing FastSite's interpretation of the data (and correcting any fields) click the **OK** button and FastSite will import your file. An example of this page is shown below.

<b>File name:</b>	C:\fastsite\dataGuide\powersrc-dist.csv		
<b>File size:</b>	627 bytes		
<b>Number of records found:</b>	6		
<b>Field assignments:</b>	<b>Field</b>	<b>First Record</b>	<b>Type</b>
	1	BC Hydro	Name
	2	42 Dunsmuir St	Address
	3	11th Floor	Address
	4	Vancouver	City
	5	BC	State/Province
	6	V6B5R3	Zip/Postal
	7	(800) 214-9771	Phone
	8	www.bchydrosupply.bc.ca	URL
	9	bchydro.jpg	Image
	10	C:a,c	Search Attributes
11	Contractors Only M-F 7:00AM - 4:00PM Sa 7:00AM - 12:00 NOON	Notes	

OK Cancel

## About CSV Files and Spreadsheets

The **Check if the file is in CSV (comma delimited) format** box should be checked if the data in your text file designates fields by separating them with commas. This is a common format when using data from popular spreadsheet and database programs, such as Microsoft Excel.

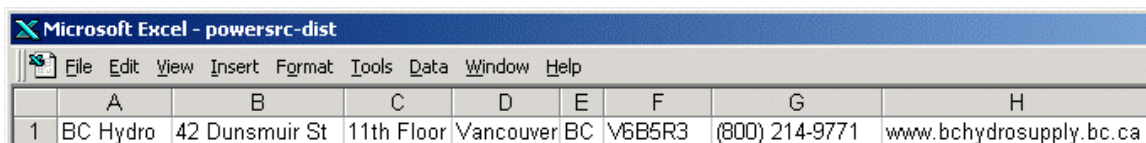
**IMPORTANT:** Please note that each data field must be stored in its own spreadsheet cell in order for FastSite to import your CSV file without problems: Name, Address, City, State/Province, Zip or Postal Code, Notes (if any), Web page address (if any), Image (if any), Attributes (if any). There are a few other format requirements:

- ? If you want to have more than one line for the Notes field, you can specifically instruct FastSite where to place the line breaks by embedding a '<br>' where you want the carriage return to occur. If you do not include any '<br>' symbols, then FastSite will wrap the text in the most efficient manner when displaying it as part of the results grid to your customer. Note that if you are simply using a text file and not a spreadsheet, then you do not need to use the '<br>' symbol as you can include carriage returns in the text file that FastSite will interpret correctly.
- ? The Web page address field requires that you preface the address with **URL:** or **http://**.
- ? The Attributes field requires that you include the **ATTRIBUTES:** or **a:** prefix.

## Excel Example

If your data is in a Microsoft Excel spreadsheet and adheres to the format specified above, you can choose the **Save As** choice from the File menu and select the **CSV (Comma Delimited)** format. Once you do this, your data file will be saved with a .csv extension. FastSite can easily import this file type. If you were to open this file with a text editor, you would see that the data contained within each column is delimited by a comma.

For example, consider a spreadsheet that has a full 11 columns of data: Name, Address, Address 2, City, State/Province, Zip/Postal Code, Notes line 1, Notes line 2, Notes line 3, URL, Image, Attributes. It would appear as:



The screenshot shows a Microsoft Excel spreadsheet with the following data in row 1:

	A	B	C	D	E	F	G	H
1	BC Hydro	42 Dunsmuir St	11th Floor	Vancouver	BC	V6B5R3	(800) 214-9771	www.bchydrosupply.bc.ca

continuing to column K. Saving the spreadsheet as a .csv file would produce the following if viewed with a text editor:

```
"BC Hydro", "42 Dunsmuir St", "11th Floor", Vancouver, BC, V6B5R3, "(800) 214-9771", www.bchydrosupply.bc.ca, bchydro.jpg, "C:a,c", "Contractors Only<br>M-F 7:00AM - 4:00PM<br>Sa 7:00AM - 12:00 NOON"
```



## About Text Importing Formats

The text format that FastSite accepts for importing data is as follows:

Name {carriage return}  
Address line 1 {carriage return}  
Address line 2 (optional) {carriage return}  
City, State/Province Zip/Postal Code {carriage return}  
Phone Number (optional) {carriage return}  
Web Site Address (optional) {carriage return}  
Notes (optional, 1 or more lines separated by carriage returns)  
Image (optional, upgrade required) {carriage return}  
Attributes (optional, Gold customers only) {carriage return}

\*\*\*Note that you may omit any or all of the optional lines.\*\*\*

Below are a few examples of valid data formats. (Note: For detailed information on the formats supported for each individual data field i.e., Name, Address line 1, Phone Number, etc., see the section Specific Formatting Issues for Each Field Type.)

### *Example 1: Simple Address With Phone and Notes*

My Customer  
201 Main Street  
My Town, Minnesota 12345  
123-456-7890  
Willing to display model #456  
to interested prospective customers  
on Mondays or Fridays from 12-5pm CST

### *Example 2: Simple Canadian Address With Phone and Notes*

My Customer  
600 Sackville Rd  
Sault Ste. Marie, Ontario P6B 6J6  
123-456-7890  
Willing to display model #456  
to interested prospective customers  
on Mondays or Fridays from 12-5pm

### *Example 3: Two Line Address (Street and Suite) with Phone and URL*

My Customer  
201 Main Street  
Suite 204  
My Town, Minnesota 12345  
098-765-4321  
<http://www.mysite.com>

### *Example 4: Advanced Address With Phone, URL, Image, Attributes, and Notes*

My Customer  
201 Main Street  
My Town, Minnesota 12345  
123-456-7890  
<http://www.mysite.com>  
model456-picture.jpg  
ATTRIBUTES:a,c  
Willing to display model #456  
to interested prospective customers  
on Mondays or Fridays from 12-5pm CST

## Specific Formatting Issues for Each Field Type

### For Name, Address, City, State, Zip Fields

For United States addresses, the recommended format is to have Name, Address, and [City, State Zip] fields each on a line separated by carriage returns as shown. Each line can be up to 64 characters in length. An example is shown below.

```
My Customer
201 Main Street
My Town, Minnesota 12345
```

However, for the [City, State Zip] line, you may have the [Zip] field on an additional line below [City, State] as shown in the following example:

```
My Customer
201 Main Street
My Town, Minnesota
12345
```

For Canadian addresses, the recommended format is to have Name, Address, and [City, Province Postal Code] fields each on a line separated by carriage returns as shown. Each line can be up to 64 characters in length. An example is shown below.

```
My Customer
201 Sackville Rd.
Sault Ste. Marie, Ontario P6B 6J6
```

Canadian addresses may also have the [Postal Code] field on an additional line below [City, Province] as shown in the following example:

```
My Customer
201 Sackville Rd.
Sault Ste. Marie, Ontario
P6B 6J6
```

### For the Phone field

The Phone field can be prefaced by the word phone (either in all uppercase or all lowercase) followed by a colon and then the phone number. In the case of the words, PHONE or phone, these words serve only to tell FastSite that what follows is a phone number and the actual words (PHONE or phone) do not appear on your Results page. The phone number can appear in any of the following formats:

```
(###) ###-#### or
###-###-#### or
### ### ####
```

The following examples show valid Phone field formats:

#### *Example 1*

```
My Customer
201 Main Street
My Town, Minnesota 12345
PHONE: (123) 456-7890
```

*Example 2*

My Customer  
201 Main Street  
My Town, Minnesota 12345  
123-456-7890

*Example 3*

My Customer  
201 Main Street  
My Town, Minnesota 12345  
123 456 7890

**For The Web Site Address Field**

The web site address field, which is optional, must be prefaced by the word URL (in upper case) or url (in lower case) followed by a colon and then the address; or the address must be prefaced by http://. In the case of the words, URL or url, these words serve only to tell FastSite that what follows is a web address and the actual words (URL or url) do not appear on your Results page. Note however, that http:// would appear as part of the web site address on your Results page. Web site addresses can be up to 256 characters in length. The following examples show valid Web Site Address fields:

*Example 1*

My Customer  
201 Main Street  
My Town, Minnesota 12345  
URL: www.mycustomer.com

*Example 2*

My Customer  
201 Main Street  
My Town, Minnesota 12345  
URL: http://www.mycustomer.com

*Example 3*

My Customer  
201 Main Street  
My Town, Minnesota 12345  
http://www.mycustomer.com

**For The Image Field**

The image field is only available to those who have purchased the upgrade allowing images to be displayed along with the standard results. The image field is simply the name of either a JPEG or GIF image file in the format:

my-image-name.jpg or  
my-image-name.gif

The image field should not be prefaced with any text. It should only contain the name of the file. The file name can be up to 32 characters in length. The following examples show valid image fields:

*Example 1*

My Customer  
201 Main Street  
My Town, Minnesota 12345  
URL: www.mycustomer.com  
MyCustomer.gif

*Example 2*

My Customer  
201 Main Street  
My Town, Minnesota 12345  
URL: http://www.mycustomer.com  
my-customer.jpg

**For The Attribute Field**

The attribute field is available only to Gold customers. Search attributes can be used in two ways. The first way is to define regional sales or distribution territories. The second way is to use attributes of a location to further narrow the geographic search. You use the appropriate attribute code according to the behavior you intend. Both methods are described below.

**Using Attributes to Define Territories**

This allows you to direct your customers to the nearest distributor or sales representative. For U.S. locations, you accomplish this by entering the state and/or counties within states (i.e., the territories) into the Attribute Codes field for each dealer. For Canadian locations, you use the province name as the territory. Then, when a customer enters a zip code or city/state into the locator, the dealer record containing that category will be displayed. For example, if Dealer4 covers the state of NY and one county in Massachusetts, the attributes for his record may be: `ny,ma:middlesex`. In Canada, if DealerCN4 covers the provinces of Ontario (ON) and British Columbia (BC), then the attributes for his record are: `on, bc`.

Attributes used to define territories must be a comma separated list (without spaces after the comma) in either of the following formats:

**state abbreviation** (for the entire state) (i.e. *MS*)

or

**state abbreviation:county name** (for the county within the state)(i.e. *MS:ADAMS*)

or

**province abbreviation** (for Canadian locations)

For multiple counties or states or provinces, use a comma separated list as shown in this example:

`MA:MIDDLESEX,MA:SUFFOLK,CT`

In this example, the territory includes two counties in Massachusetts and the entire state of Connecticut.

The attribute field must be prefaced by `ATTRIBUTES:` (in upper case) or `attributes:`, or the attribute field must be prefaced by `A:` or `a:`. In the case of the words, `ATTRIBUTES` or `attributes`, these words serve only to tell FastSite that what follows are attribute codes and the actual words (`ATTRIBUTES` and `attributes`) do not appear on your Results page. The remainder of the line is the comma separated list of attributes (without spaces after the commas).

The following examples show valid attribute fields:

*Example 1*

My Dealer  
201 Main Street  
My Town, Minnesota 12345  
URL: www.mydealer.com  
MyDealer.gif  
ATTRIBUTES: ct,ny,ma:suffolk,ma:middlesex

*Example 2*

My Dealer  
201 Sackville Rd.  
Sault Ste. Marie, Ontario P6B 6J6  
URL: http://www.mydealer.com  
my-dealer.jpg  
a: on,bc

IMPORTANT: if you decide to use territories, you must either define a dealer for all possible territories (ideally) or you can define some dealers with territories and a single dealer, perhaps with company information, with no attributes. Then, if a customer enters a zip code that doesn't appear in a defined territory, the default record (the one with no attributes) is displayed. If you do not create a default record and you omit a territory (a single county or state or province) and a customer enters a zip code in that omitted territory, then an error message will be displayed to your customer. FastSite provides a complete list of states and corresponding county names as well as provinces at: <http://fastsite.com/help/countyList.txt> to help you.

**Using Attributes to Further Narrow the Search**

You can also use attributes to allow your customers to further restrict their geographic search by the specific attributes of the locations nearest to them. The attribute codes are the very short internal names that are associated with the attribute names that appear to your customers. You should use the internal attribute code or codes required for this record, such as:

a, c

For example, paint stores may have attributes of *paint*, *wallpaper*, and *stain*, each of which is associated with an internal attribute code, such as *a*, *b*, and *c*, respectively. In this field, you would specify one or more attribute codes, such as: a, c. If more than one attribute code applies to this record, then the list of attribute codes must be separated by commas.

If you intend to use attributes in this way, you must remember to define the attributes by clicking the **click to edit** link beneath the **Attribute Codes** field. This will take you to a screen whereby you can associate attribute names (like *paint*, *wallpaper*, and *stain*) with internal attribute codes (*a*, *b*, and *c*). Later, when you start designing your results page, you will choose how you want the attributes to be displayed to your customer (either as a series of checkboxes or in a multi-click dropdown menu).

The attribute field must be prefaced by 'ATTRIBUTES:' (in upper case) or 'attributes:'. The attribute field must be prefaced by 'A:' or 'a:'. In the case of the words, 'ATTRIBUTES' or 'attributes', these words serve only to tell FastSite that what follows are attribute codes and the actual words ('ATTRIBUTES' and 'attributes') do not appear on your Results page. The remainder of the line is a comma separated list of attribute codes.

The following examples show valid attribute fields:

*Example 1*

My Customer  
201 Main Street  
My Town, Minnesota 12345  
URL: www.mycustomer.com  
MyCustomer.gif  
ATTRIBUTES: a,c,e,ff,g

*Example 2*

My Customer  
201 Main Street  
My Town, Minnesota 12345  
URL: http://www.mycustomer.com  
my-customer.jpg  
a: 1,2,5

## Exporting Your Data

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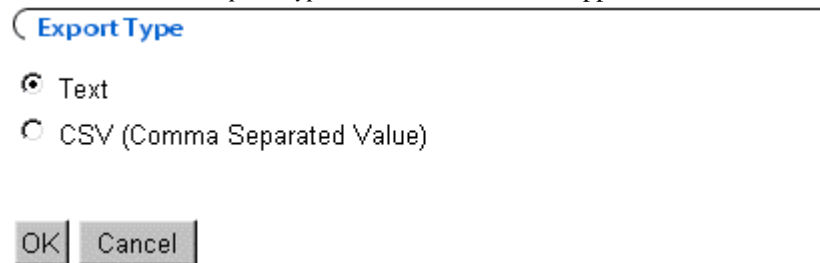
You can export the data in your list to either a text file (.txt) or to a .csv file (a comma separated value format used by database and spreadsheet programs, such as Microsoft Excel) as follows:

1. Click **Export Your Data** on the selected list's toolbar as shown below.



A page will appear with your exporting options.

2. Select the desired *Export Type* from the choices that appear as shown below.



3. Click the **OK** button. FastSite will do the following based on your selection:
  - ? For text files, FastSite will display the text in your browser window. You can then choose **Save As** from the **File** menu in your browser to save it to a .txt file directly or you can copy and paste it into another program and save it as a .txt file.
  - ? For CSV files, a prompt appears asking you to save the file and to specify a location. The prompt that is displayed is determined by which browser you are using. By default, the file name is the name of your list with a .csv extension. Afterwards, you can use this .csv file to modify or update your data. You can import this file into Microsoft Excel or other spreadsheet and database programs that support this file type.