

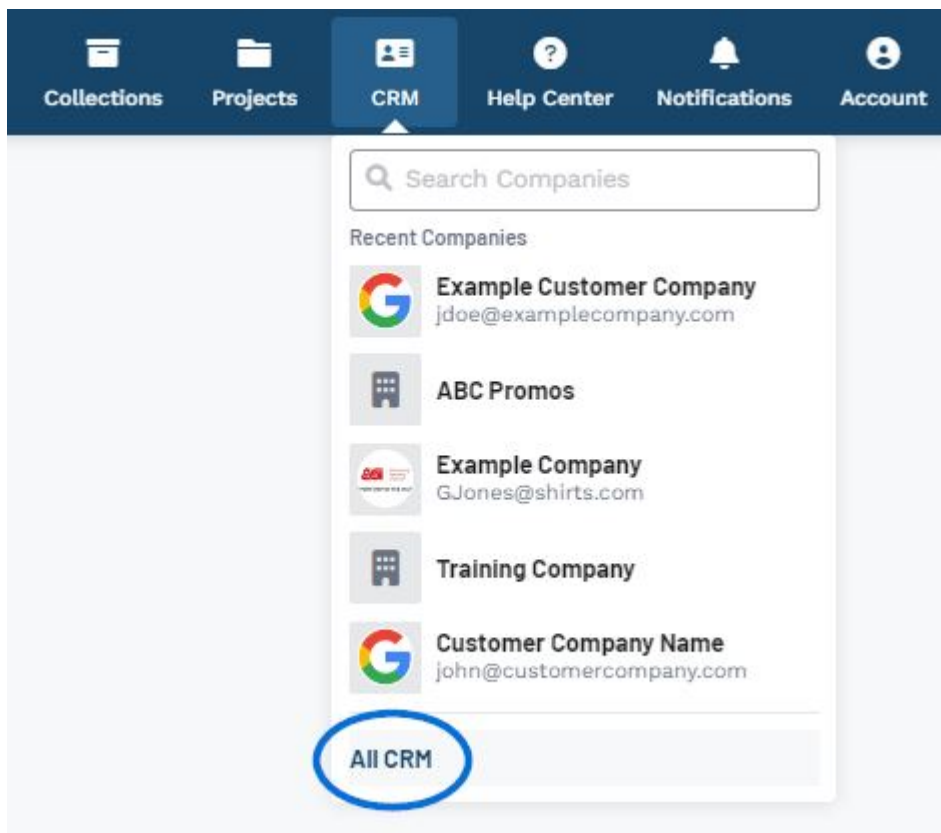
Import From a File

Jennifer M - 2023-02-22 - CRM

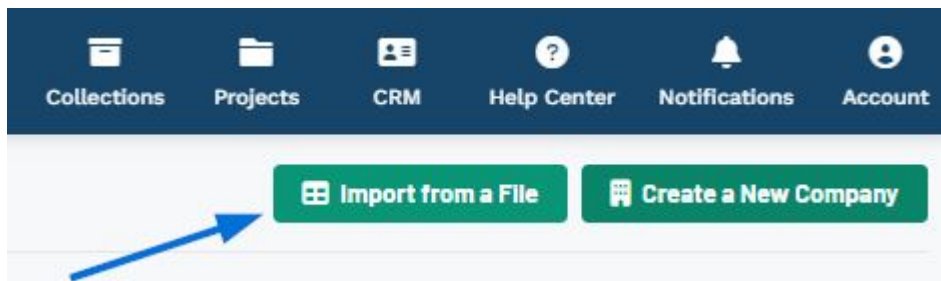
CRM enables you to import company and contact information from a file on your computer.

[See a full import in action!](#)

To begin the import process, expand the CRM option on the main toolbar and then click on All CRM.



In the upper right of the CRM homepage, click on the Import from a File button.



The Import from a File window will open and you can begin to configure your data. The available fields are:

- **File Type**

Use this dropdown to select the type of file you would like to import. Compatible file types are CSV, Outlook, Google, IIF (QuickBooks), and Vcard. It is important to note that CSV columns should have a header for each column to ensure proper mapping.

- **Companies/Contacts**

Select which option best describes the majority of the data.

- **Record Owner**

The Record Owner is the ESP+ User within the company who will be responsible for managing the companies and/or contacts after import.

- **Upload File**

Use the "Choose File to upload" button to browse your computer and locate the file you would like use for import.

Import from a File
Your personal CRM and Order data is yours. Your information won't be accessed, reviewed or shared with anyone outside of our secure data center unless you provide permission.

Your Data

File Type

CSV

By uploading a CSV file with your companies or contacts you can map the columns to existing company/contact fields. Please make sure each column in your CSV contains a heading.

Upload your Companies or Contacts in single CSV file to get started.

☒ Companies ☐ Contacts

Record Owner

Jenn Shinberg

Upload File

Choose File to Upload
or drag and drop here.

← Back Map Data

Once you have finished configuring the import options, click on the Map Data button.

Selected File:

CustomerListForImport.csv

← Back Map Data

The Map Your Data page will be displayed. The data within the uploaded file will be analyzed and a predicted field will be provided for each column.

[See mapping in action!](#)

Map Your Data

Match your CSV columns to fields to complete your import.

Displaying Column 1 of 15

Company Name

Company Name

ABC Company
DEF Company
GHI Company

Skip Edit

Company Name	Type	Phone	Email	Website	Address Name	Address Street	City
ABC Company	Customer	555-555-5555	sales@abccco.com	www.abccompany.com	Main Location	4800 Street Road	Treose
DEF Company	Customer	555-555-5556	sales@defcompany.com	www.defcompany.com	Main Location	123 Example Street	Example
GHI Company	Customer	555-555-5557	sales@ghicompany.com	www.ghicompany.com	Main Location	456 Example Street	Example

State	Zip	County	Country	Contact First Name ✓	Contact Last Name ✓	Contact email
PA	19053	Bucks	USA	John	Doe	jdoe@abc.com
PA	19053	Bucks	USA	Thomas	Smith	tsmith@def.com
PA	19053	Bucks	USA	Anna	Williams	awilliams@ghi.com

Company Name is required.

Cancel Import Data

Column has green header text and checkmark

If the column header exactly matches a field, it will be displayed with green text followed by a checkmark. You are able to click on the column and use the Edit button to change the mapped destination.

Company Type ✓

Customer
Customer
Customer

Edit

The Edit button enables you to select from all of the available fields within CRM for both companies and contacts.

Displaying Column 2 of 15

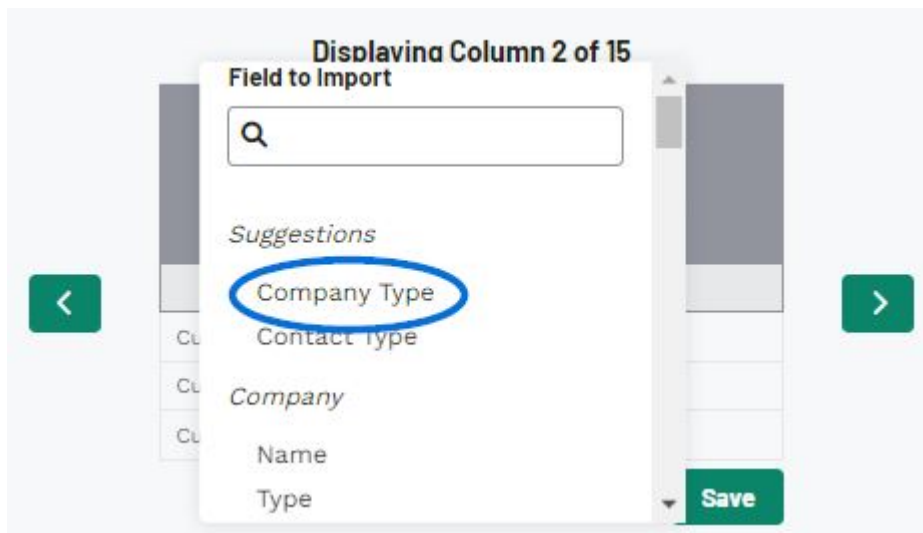
Type

Type

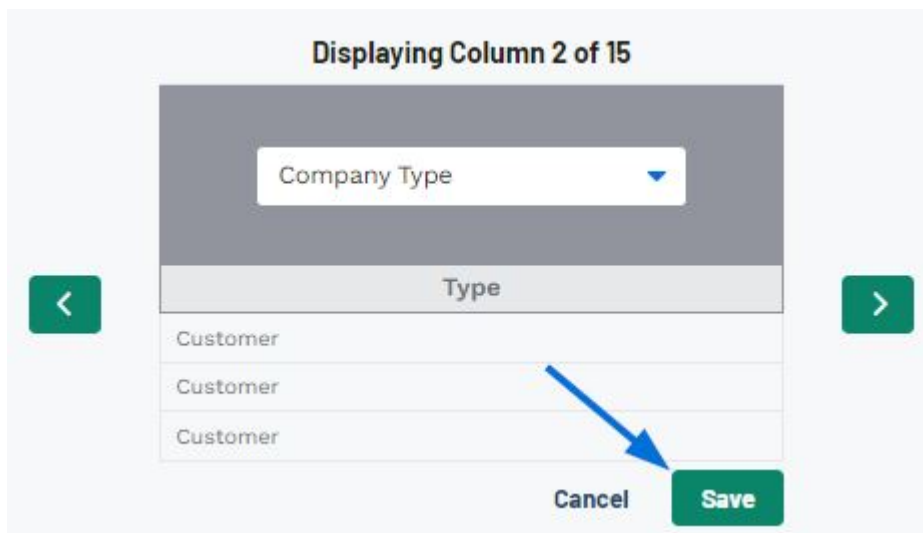
Customer
Customer
Customer

Skip Edit

Click on the field you would like from the available options.



Click on the Save button.



The column will now be displayed with green text followed by a checkmark.

Company Type ✓
Customer
Customer
Customer

Skip

If there is a column within the uploaded data that you do not want to include in the final import, click on the column and then click on the Skip button.



The column will now be greyed out and the header display red text that reads: "Will not be imported".

Will not be imported	Address Street
Main Location	4800 Street Road
Main Location	123 Example Street
Main Location	456 Example Street

When you are finished mapping the columns, click on the Import Data button at the bottom.

Contact First Name ✓	Contact Last Name ✓	Contact Email Work Email ✓
John	Doe	jdoe@abc.com
Thomas	Smith	tsmith@def.com
Anna	Williams	awilliams@ghi.c...

Buttons: Cancel Import Data

Once the data has been imported, a success message will appear in the bottom right.

