fibreCRM

Visit **support.fibrecrm.com** for more info or contact your CRM Manager

Importing People Records

1. To **Import Person** records, navigate to the **People** module and select **Import People.**

PEOPLE   CONTACTS

- Create Person
- Create Person From vCard
- View People
- **Import People**
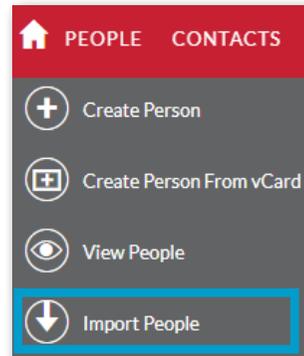
2. You'll need to upload an **Import File** with all the data you'd like to import. There is a csv template to download to show you how to set up the file. Once done click **Choose File** and then locate your import file. Leave the bottom option on create new records only and click **Next.**

STEP 1: UPLOAD IMPORT FILE

Select a file on your computer that contains the data that you would like to import, or download the template to get a head start on creating the import file.

Download Import File Template

Select file:
Choose file | Prospect Upload (1).csv

What would you like to do with the imported data?
- Create new records only
- Create new records and update existing records

NEXT >

3. On the next step you can **View Import File Properties** if you need to. If you're happy with everything click **Next.**

STEP 2: CONFIRM IMPORT FILE PROPERTIES

Here is how the first several rows of the import file appear with the detected file properties. If a header row was detected, it is displayed in the top row of the table. View the import file properties to make changes to the detected properties, the settings will update the data appearing in the table.

First Name	Last Name	ID	Salutation	Job Title	Department	Organisation	Email Address	Non Primary E-mails	Mobile Phone	Office Phone	Other Phone	Fax Address	City	County	Postcode
Chris	Walker					Bread and Cakes LTD	chris.walker@demo.com			07859 094033					
Rosie	Collins					Hill VFX	rosie.collins@example.com			07111 222033					

VIEW IMPORT FILE PROPERTIES

If the import file data was exported from any of the following sources, select which one.
- None
- Salesforce.com
- Microsoft Outlook

< BACK **NEXT >**

4. On the next screen make sure the fields under the **Row 1** heading match with what is in the drop down under the **Module Field**. Then scroll to the bottom and click **Next.**

STEP 3: CONFIRM FIELD MAPPINGS

The table below contains all of the fields in the module that can be mapped to the data in the import file. If the file contains a header row, the columns in the file have been mapped to matching fields. Check the mappings to make sure that they are what changes, as necessary. To help you check the mappings, Row 1 displays the data in the file. Be sure to map to all of the required fields (noted by an asterisk).

VIEW NOTES

Header Row	Module Field	Row 1
First Name	First Name	Chris
Last Name	Last Name *	Walker
ID	ID	
Salutation	Salutation	
Job Title	Job Title	
Department	Department	
Organisation	-- Do not map this field --	Bread and Cakes LTD

5. The next screen will ask which fields you would like to use to check if the record already exists in the CRM. Usually we would use email address but you can use any of the **Available Field** options. Click on the option and drag it left to the **Fields to Check** column and then select **Import Now.**

STEP 4: CHECK FOR POSSIBLE DUPLICATES

To avoid creating duplicate records, select which of the mapped fields you would like to use to perform a duplicate check while data rows in the import file containing the data will be displayed along with the import results (next page). You will then be able to select

Fields to Check	Available Fields
Email Address	Assigned User
	First Name
	Last Name
	Name
	Reports to ID

To save the import settings, provide a name for the saved settings:

< BACK   **IMPORT NOW**

6. It will then start the import and bring up a progress bar. Once it has finished you will get the below completion screen where it will tell you if there were any errors or duplicates found and give you a list of all the People and Organisations it has imported.

STEP 5: VIEW IMPORT RESULTS

Summary

1 records were created
19 rows were not imported due to error

UNDO IMPORT   **IMPORT AGAIN**   **EXIT**

Created Records
Duplicates
Errors

People

Person ID	Name	Organisation	Email
COL05679	Rosie Collins		rosie.collins@example.com
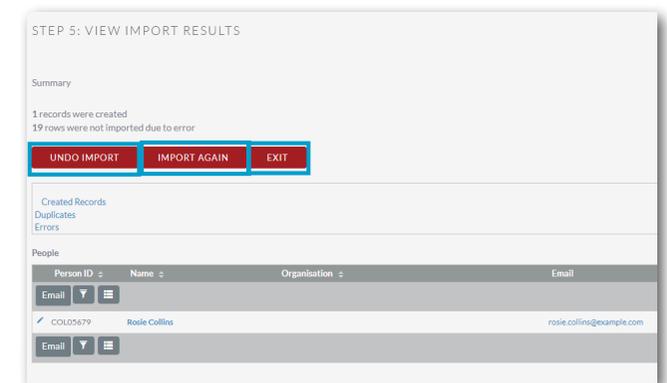
7. If for any reason something goes wrong, you can click the **Undo Import** button to remove everything that has been added and start again. If you're happy with everything click **Exit.**