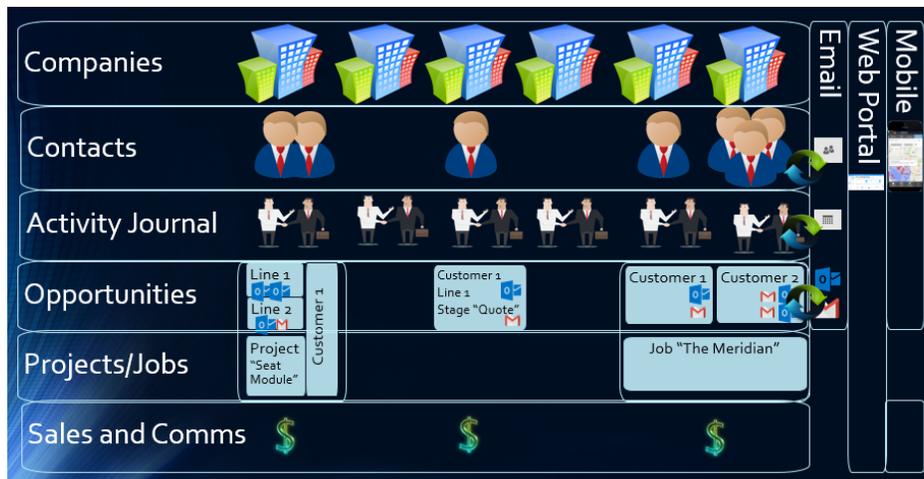


# How to Import Companies/Contacts



# repfabric®

Connecting the threads of multi-line selling



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# Need help?

Email:

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## How to Import Companies & Contacts

In the “Data Management” section of Repfabric, you can “Import CRM Info” (Companies, Contacts, Products and Opportunities). This tutorial will show the steps to import Companies or Contacts.

### How to prepare the template in Excel ([click here for template](#))

1. Click the menu icon, 4 lines in upper left corner.
2. Hover over “Data Management.”
3. Click “Import CRM Info.”

As we add new fields in a Company or Contact, the templates will be updated. Make sure you are using the newest template. See the next page for instructions.

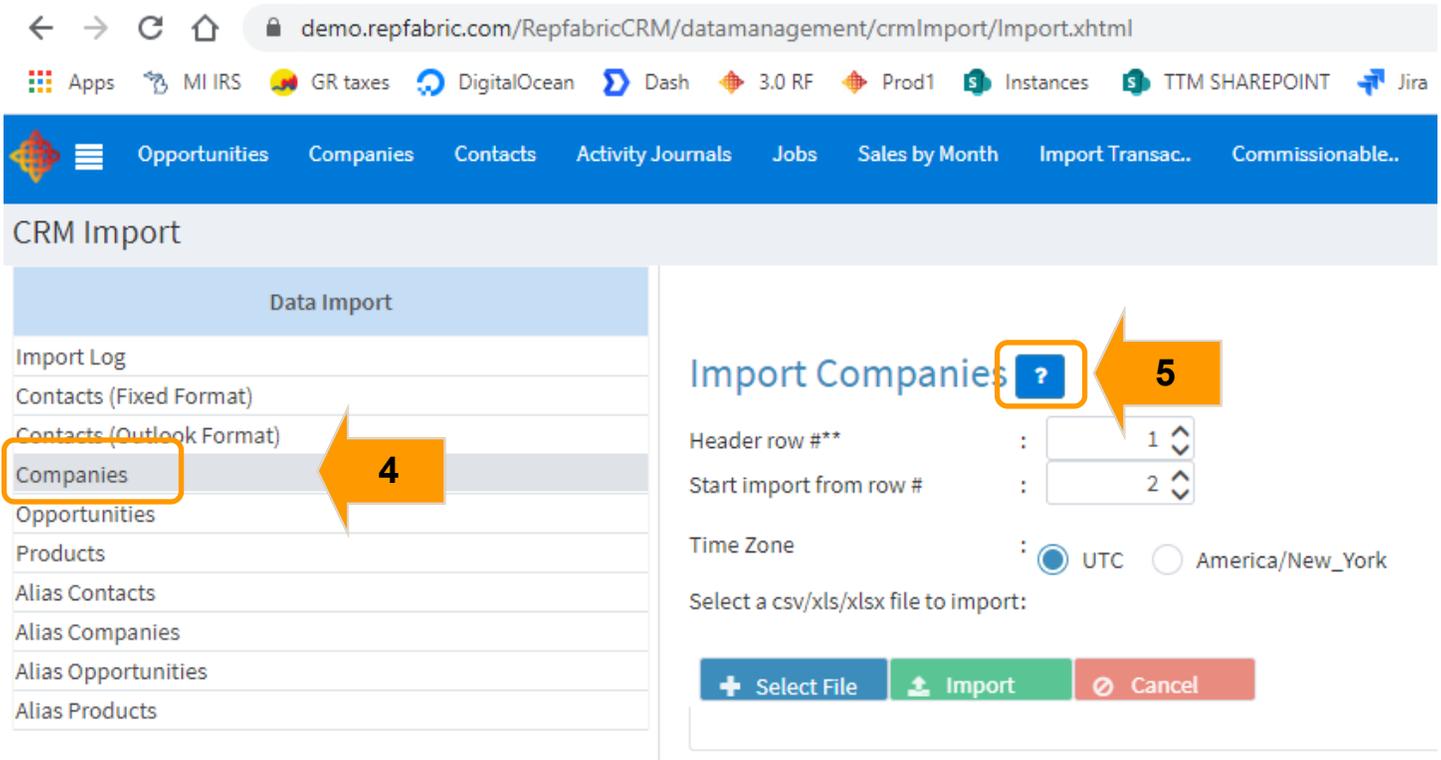
This image shows the menus.

The screenshot shows the Repfabric CRM interface. The browser address bar displays `demo.repfabric.com/RepfabricCRM/index.xhtmll`. The navigation bar includes links for Opportunities, Companies, Contacts, Activity Journals, and Jobs. A menu icon (three horizontal lines) is highlighted with an orange arrow labeled '1'. A dropdown menu is open, showing options like Companies, Contacts, Opportunities, Activity Journals, Tasks, Messages, Email, Calendar, Planner, More CRM..., Reporting, Data Management, and Settings. The 'Data Management' option is highlighted with an orange arrow labeled '2'. A sub-menu is open under 'Data Management', showing options like Import Transactions, Commissionable Transactions, Internal PN Splits, Customer Exceptions, PO Exceptions, Region Restrictions, Import CRM Info, and Commission Data. The 'Import CRM Info' option is highlighted with an orange arrow labeled '3'. The background shows a table with 'Tesla' entries and a 'My Opportunities' section at the bottom.

## How to Import Companies or Contacts (continued...)

4. Click "Companies."
5. Click the blue question mark to see template list.
6. Scroll down and copy the section for "Companies."

This image shows how to find the newest templates.



The screenshot shows a web browser window with the URL `demo.repfabric.com/RepfabricCRM/datamanagement/crmImport/Import.xhtml`. The navigation bar includes 'Opportunities', 'Companies', 'Contacts', 'Activity Journals', 'Jobs', 'Sales by Month', 'Import Transac..', and 'Commissionable..'. The 'CRM Import' section is active, displaying a 'Data Import' menu on the left and a configuration panel on the right. In the menu, 'Companies' is highlighted with an orange arrow labeled '4'. In the configuration panel, the 'Import Companies' header has a blue question mark icon circled in orange with an arrow labeled '5' pointing to it. The configuration options include 'Header row #' (set to 1), 'Start import from row #' (set to 2), and 'Time Zone' (set to UTC). At the bottom, there are buttons for '+ Select File', 'Import', and 'Cancel'.

This image shows the template for Companies that we will copy and paste into Excel.



The screenshot shows an 'Info' dialog box with a close button in the top right. It contains the following text:

Distributor Commission is enabled and a sales team is provided it will be treated as tagged customer even if "Tagged customer" is not set as Y.

- Companies Import: 'Is Active?' field can be represented as No for inactive. Any other value is considered as Active.

**Column Order**

Contacts ( Outlook Format )

Title | FirstName | MiddleName | LastName | Company | Department | JobTitle | BusinessStreet | BusinessStreet2 | BusinessStreet3 | BusinessCity | BusinessState | BusinessPostal Code | BusinessCountry | Region | HomeStreet | HomeStreet2 | HomeStreet3 | HomeCity | HomeState | HomePostal Code | HomeCountryRegion | AssistantsPhone | BusinessFax | BusinessPhone | BusinessPhone2 | HomePhone | MobilePhone | AssistantsName | Categories | EmailAddress | Email2Address | Email3Address | ManagersName | Notes | ReferredBy | WebPage

**Companies**

Company Name | Type | Tagged Customer ? | Class | Category | Street 1 | Street 2 | City | State | Postal Code | Country | Phone 1 | Phone 1 Extn | Phone 2 | Phone 2 Extn | Fax | Region | Website | Call Pattern | Holiday Card Required | Sales Team | Product Potential | Comments | Company Reference No | Is Active? | Parent Company | PO Box | Tags | Created By | Creation Date | Last Modified User | Last Modified Date | Industries

Contacts ( Fixed Format )

First Name | Last Name | Contact Group | Job Title | Department | Manager | Assistant | Business Main Phone | Business Ext | Alternate Main Phone | Alternate Ext | Home Phone | Cell Phone | Personal Email | Business Email | Referred By | Context | Company | Home Address 1 | Home City | Home State | Home Postal Code | Country Code | Business Street | Business City | Business State | Business Postal Code | Business Country | Notes | Fax | Contact Ref No | Business PO Box | Home PO Box | Created By | Creation Date | Last Modified User | Last Modified Date

An orange arrow labeled '6' points to the 'Companies' section header, and an orange box highlights the 'Companies' column order list.

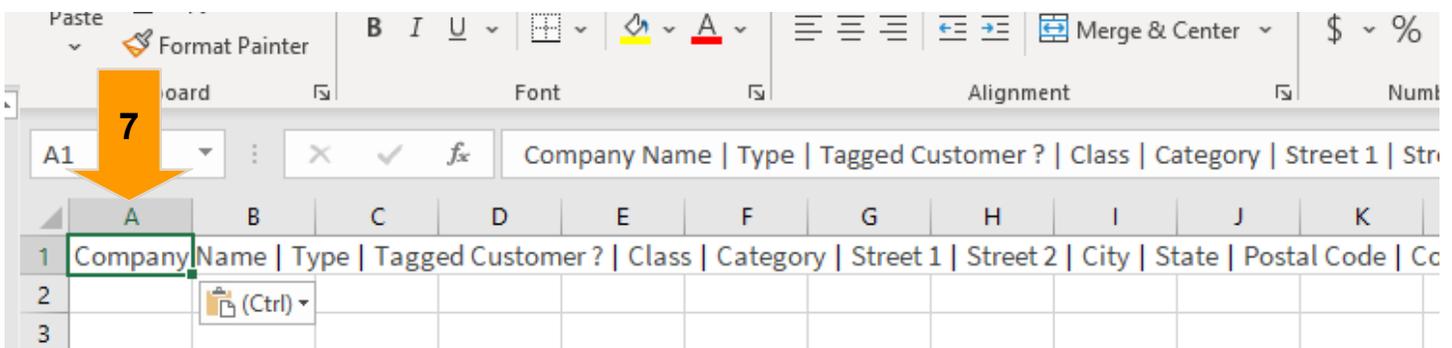


## How to Import Companies or Contacts (continued...)

- Paste into a blank Excel sheet. (This is going to put all info into one cell. You will have to use "Text to Columns" & "Trim" if you don't want to hand type the column names.)

*If you have downloaded the template from the website, just make sure you verify the list against the newest list in Repfabric.*

This image shows the columns pasted into Excel.



### Fields that are mandatory:

- Company name
- Company Type
- Address 1
- City, State, Zip
- Phone 1
- Website
- Sales Team

### Fields that require a Y or N:

- Tagged as Customer (defaults to N)
- Holiday Card Required (defaults to N)
- Is Active (defaults to Y)

## Guidelines

- 'Start import from line #' refers to the begin of import.
- Provide a header column
- Make sure all the fields are present and the ordering should be as given below except for Contacts (Outlook Format).
- Provide blank value in case of no value.
- In case of errors - data error or missing fields, failed line of records are copied into an error log file. Example: Imported file is companies.csv then the error log file will be companies\_err.csv
- Make sure that companies is imported before contacts. Contact company field will be set to blank if no matching companies is found.
- Date fields must be in **MM-dd-yyyy** format.
- Expected date time format for creation and last modified date - MM-dd-yyyy HH:mm.
- Companies Import: 'Holiday Card Required' field can be represented as Y for required and blank value if not required.
- Companies Import: 'Tagged customer' field can be represented as Y / YES for required and blank value if not required. For distributors, if Allow Distributor Commission is enabled and a sales team is provided it will be treated as tagged customer even if "Tagged customer" is not set as Y.
- Companies Import: 'Is Active?' field can be represented as No for inactive. Any other value is considered as Active.

## How to Import Template

1. Click "Select File."
2. Find & select your template.
3. Click "Open."
4. Click "Import."

These images show the "Select File" and "Import" buttons.

The screenshot shows the 'Data Import' section on the left with a list of options: Import Log, Contacts (Fixed Format), Contacts (Outlook Format), Companies, Opportunities, Products, Alias Contacts, Alias Companies, Alias Opportunities, and Alias Products. The 'Companies' option is selected. On the right, the 'Import Companies' dialog box is open, showing settings for Header row # (1), Start import from row # (2), and Time Zone (UTC). The 'Select a csv/xls/xlsx file to import:' section has three buttons: '+ Select File' (highlighted with an orange box and a number 1 arrow), 'Import', and 'Cancel'.

The screenshot shows a Windows File Explorer window with the 'Organize' and 'New folder' options at the top. The left sidebar shows 'Quick access' with links to Desktop, Downloads, and Documents. The main pane shows a folder named 'FunnyCompanies\_Master\_Companies Upload Template\_KK\_10-14-2020.xlsx' which is highlighted with an orange box and a number 2 arrow. Other files in the folder include 'AUTHORIZE\_blue\_button.png' and 'Reimport\_Contacts\_new\_ContactGroup\_KK\_10-8-2020.xlsx'.

The screenshot shows the 'Import Companies' dialog box with the 'Open' button highlighted by an orange box and a number 3 arrow. The dialog box shows the selected file 'FunnyCompanies\_Master\_Companies Upload Template\_KK\_10-14-2020.xlsx' and its size '20.0 KB'. Below the dialog box, there is a 'Load Process Status' section with a table:

Load Process Status	
Total processed: 2	Total loaded : 2

## How to Alias Companies/Contacts individually

You will need to reconcile any records that did not load for any reason. You will see red X's next to the ones that failed. If you had many errors, you could delete the batch fix the errors and import again. The batch is NOT in Repfabric totally until you absorb the records. *You can alias each record with the red x individually by using the blue edit pencil on the right side of the record. If multiple records have the same error, you can use the check boxes and drop-down for "Multi-record edit."* See next page

- A. Click 'Alias Companies.'
- B. Click the blue pencil next to a record.
- C. Update the record where needed.
- D. Scroll to bottom, click "Save."

This image shows the edit box and all it's options.

The screenshot displays the CRM Import interface. On the left, a menu titled 'CRM Import' lists various options, with 'Alias Companies' highlighted and an orange arrow labeled 'A' pointing to it. Below the menu is a table of imported records. The table has columns for Name, Type, Sales Team, Business Street, and Error. Two records are shown, both with a red 'X' in the checkbox and the error 'Sales Team: Missing;'. An orange arrow labeled 'B' points to the blue pencil icon next to the first record. An inset window titled 'Edit Record' shows the details for 'Shannon's Shades'. The 'Sales Team' field is empty, and the error message 'Error: Sales Team: Missing;' is displayed at the top. An orange arrow labeled 'C' points to the 'Sales Team' dropdown menu. At the bottom of the 'Edit Record' window, the 'Save' button is highlighted with an orange arrow labeled 'D'.

### How to Alias Multiple Companies/Contacts

- a. Place check mark next to all records that have the SAME resolution (ex. Missing SAME sales team, same company type, etc.)
- b. Click drop-down for "Multi-record edit."
- c. Select the appropriate option.
- d. Choose correct option.
- e. Click "Save."

This image shows

	#	Name ↑↓		Sales Team ↑↓
<input checked="" type="checkbox"/>	14	Shannon's Shades	customer	
<input checked="" type="checkbox"/>	14	Widgets Galore	customer	

**Select Type** [X]

Type : Customer

Sales Team: Select Sales Team

- Select Sales Team
- Admin Accounts
- All
- Bill Murray**
- Bill/Chris 50-50
- Chris Farley
- Fred Flintstone
- House

**Select Type**

Type : Customer

Sales Team: Bill Murray

**Save**



### Absorb Records

When you have aliased all the records, and they all have green check marks next to them, you will need to give the go-ahead to accept the records.

1. Click “Absorb Companies.”

This image shows the records ready to be absorbed with the green check mark.

The screenshot shows a software interface with a blue header bar containing navigation options: "y Journal", "bs", "Sales by Month", "Import Transac..", "Commissionable..", and "Sales/Comm by ..". Below the header is a toolbar with buttons: "Absorb Companies" (highlighted with a blue arrow and the number 1), "Delete Selected", and two dropdown menus: "[-- Select Batch --]" and "[-- Multi-record edit --]". Below the toolbar is a table with columns: "#", "Name ↑↓", "Type ↑↓", and "Sales Team ↑↓". The table contains two rows of data, both with green checkmarks in the selection column:

	#	Name ↑↓	Type ↑↓	Sales Team ↑↓
<input type="checkbox"/>	14	Shannon's Shades	Customer	Bill Murray
<input type="checkbox"/>	14	Widgets Galore	Customer	Bill Murray

At the bottom of the table, there are pagination controls: "(1 of 1)", navigation arrows, a page number "1", and a page size "50".

