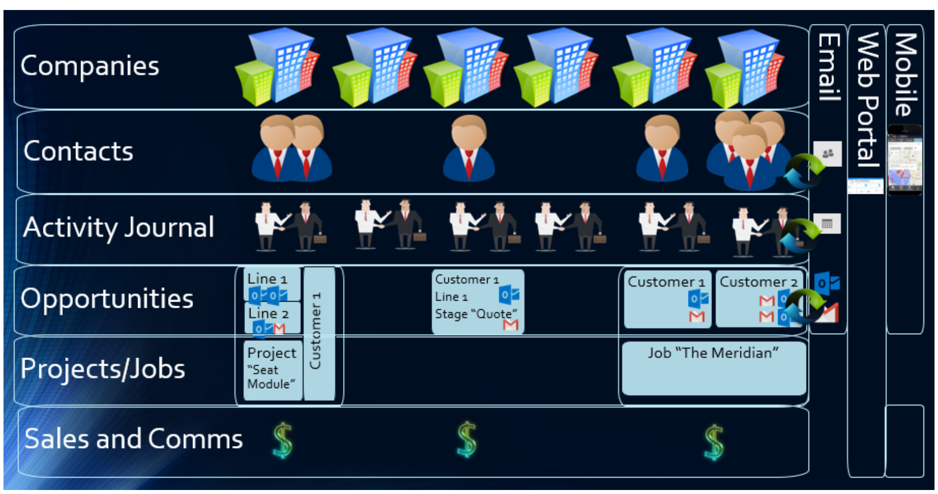
# How to Import Companies/Contacts

repfabric®

Connecting the threads of multi-line selling



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## How to Import Companies & Contacts

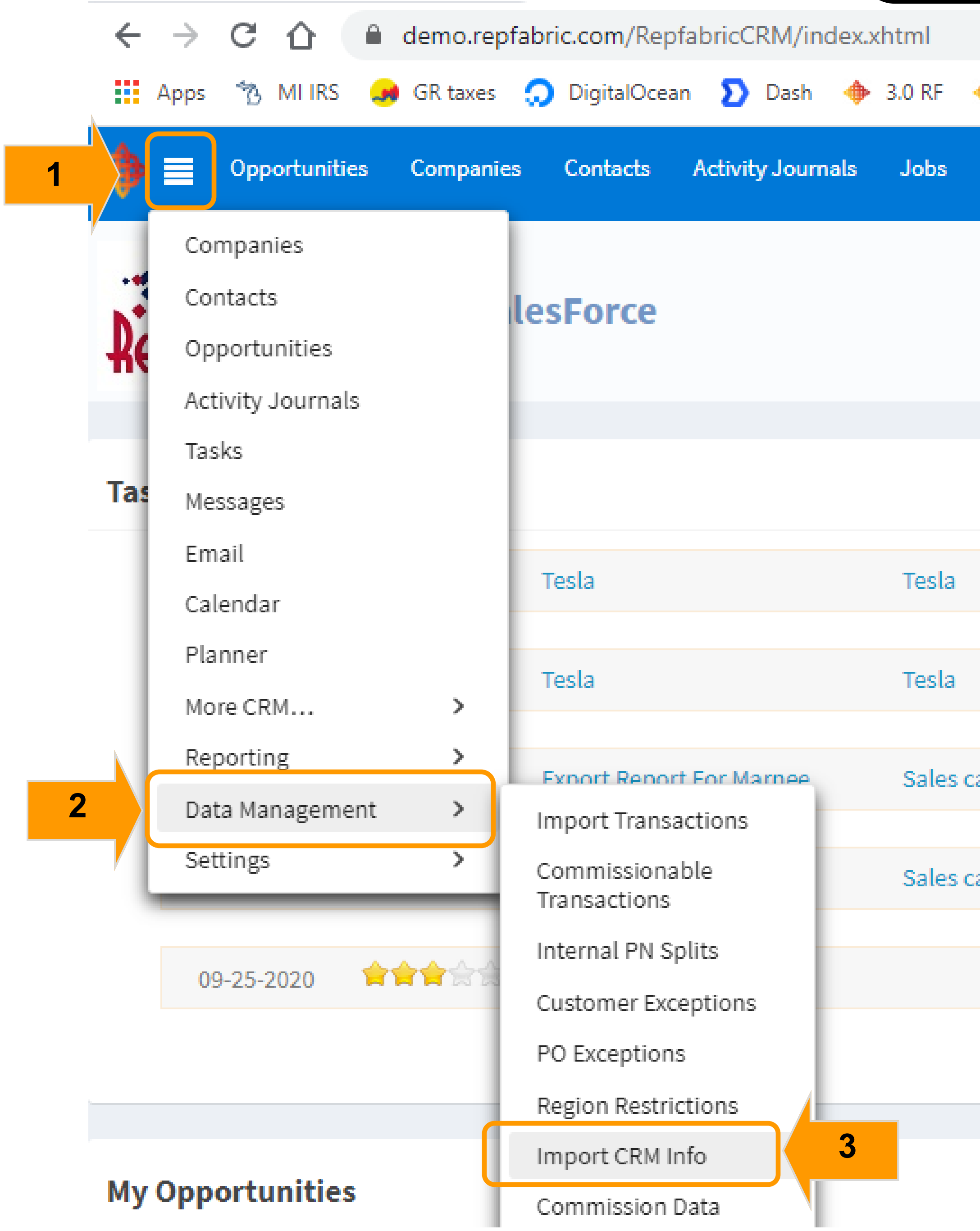
In the “Data Management” section of Repfabric, you can “Import CRM Info” (Companies, Contacts, Products and Opportunities. This tutorial will show the steps to import Companies or Contacts.

**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.

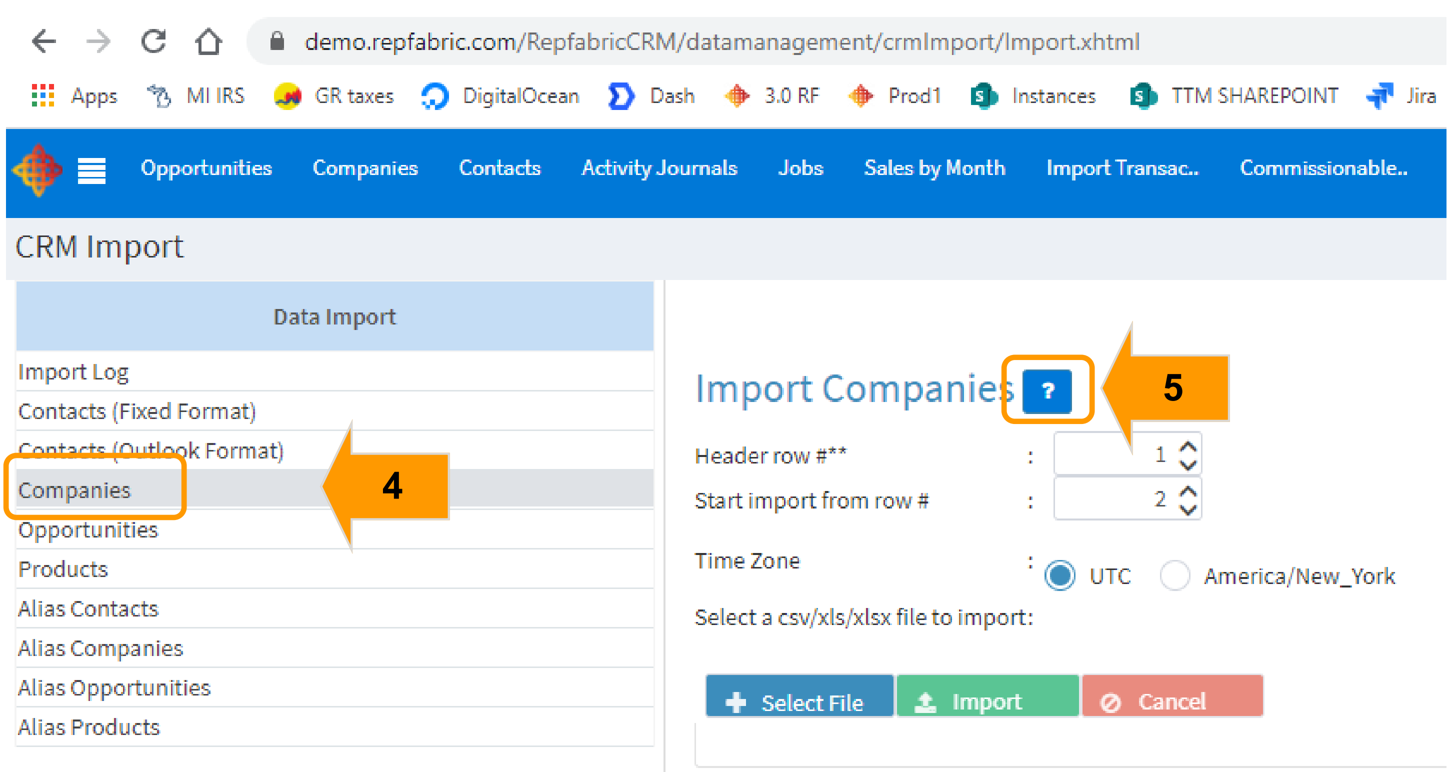
This image shows the menus.



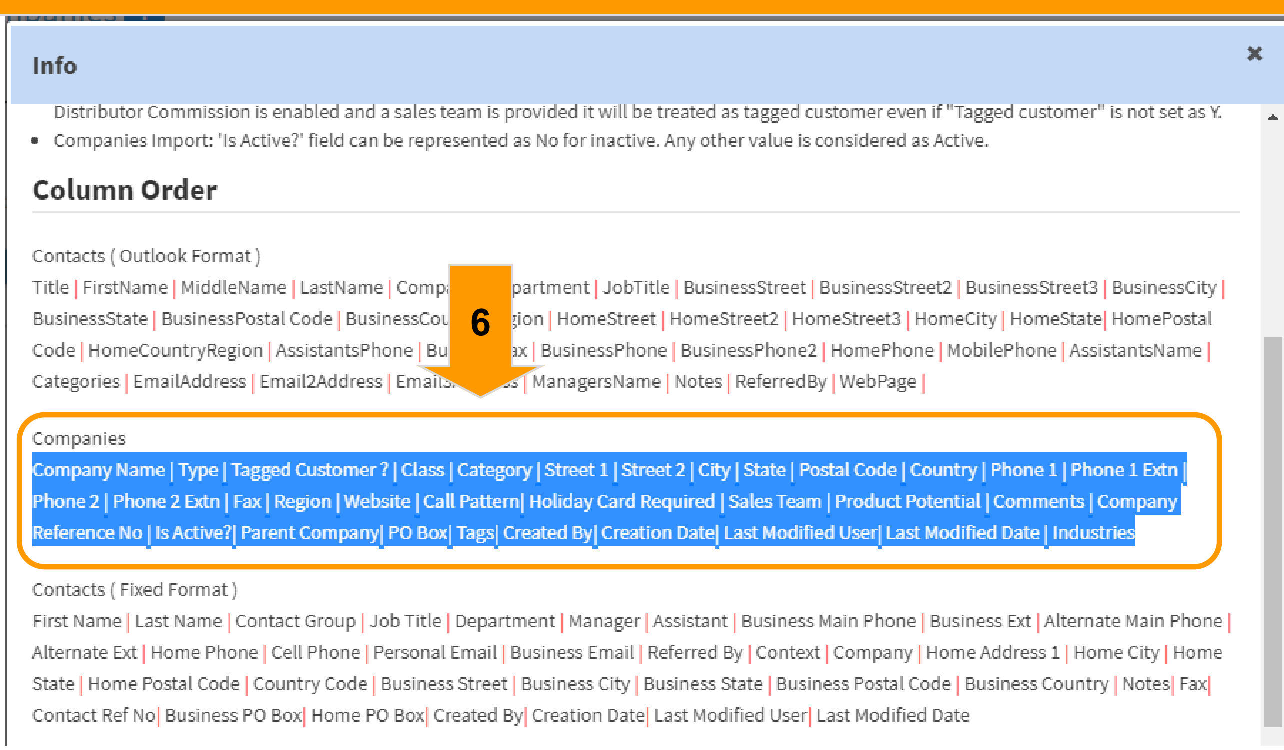
## How to Import Companies or Contacts (continued…)

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.



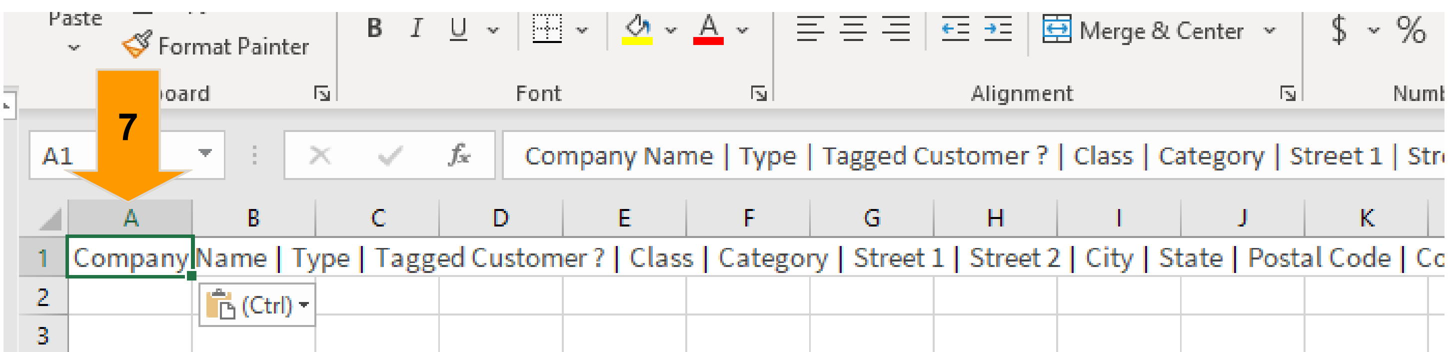

This image shows the template for Companies that we will copy and paste into Excel.



7. 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)

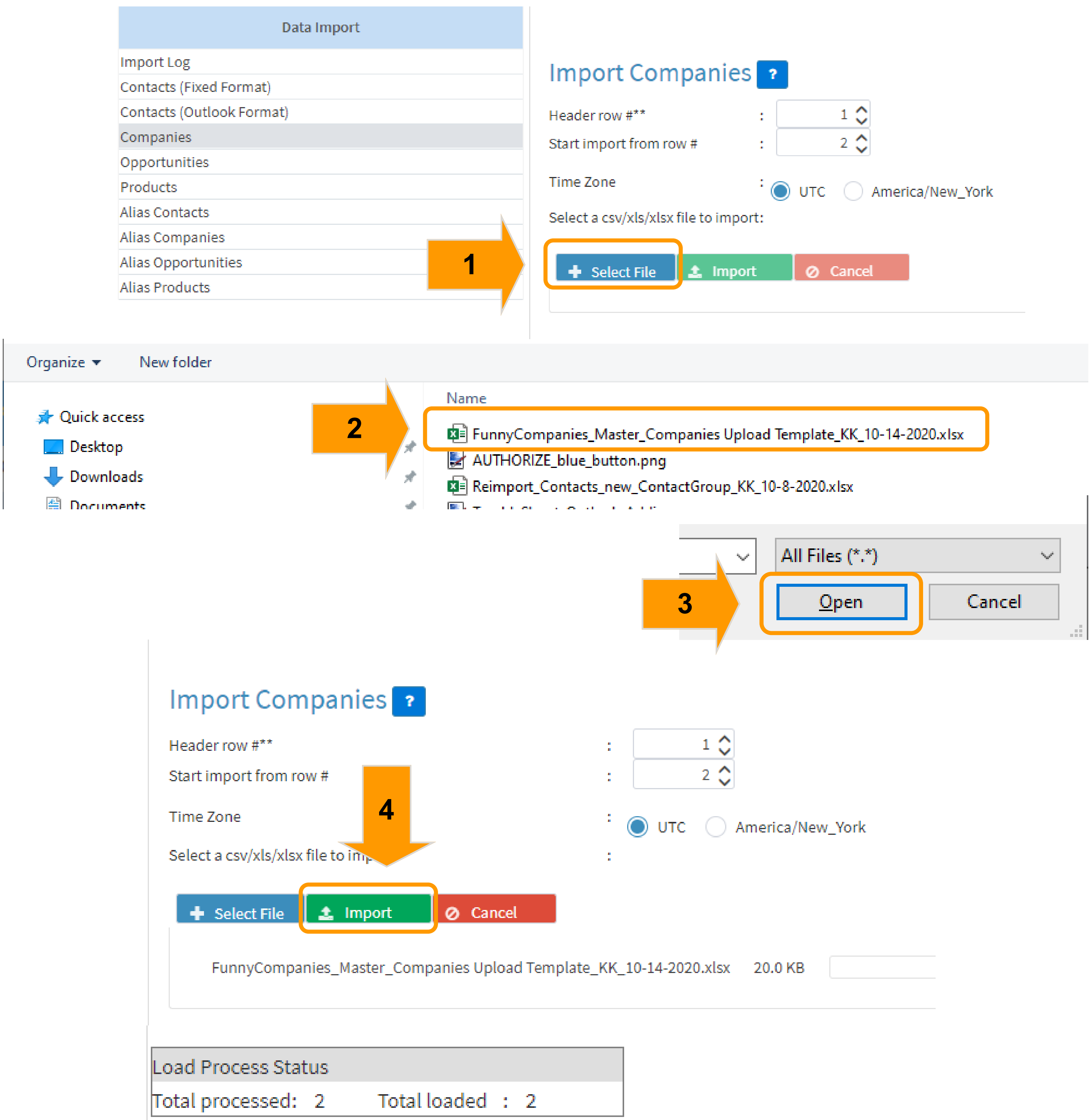
## Guidelines

- '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.

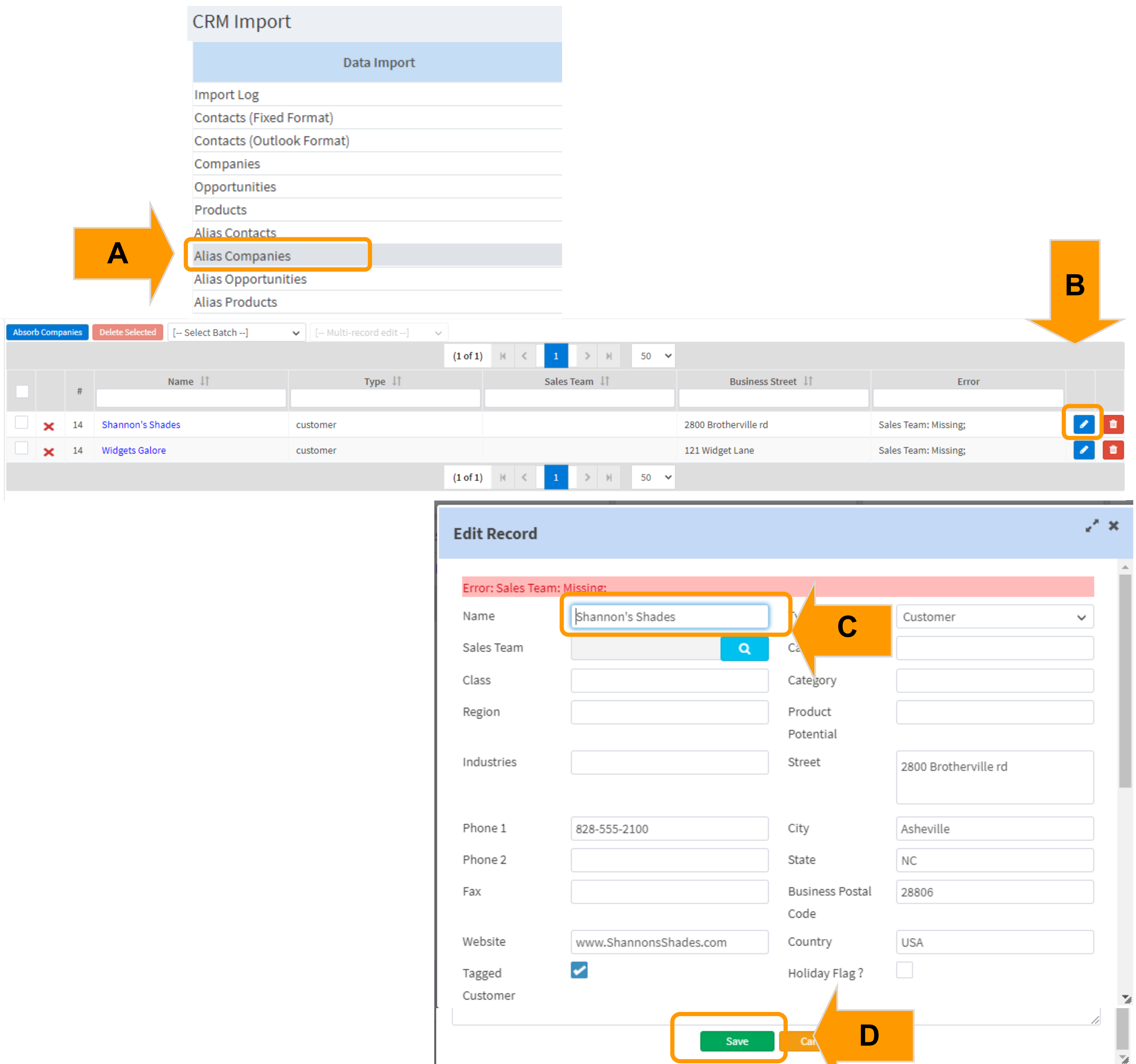


## How to Alias Companies/Contacts individually

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."

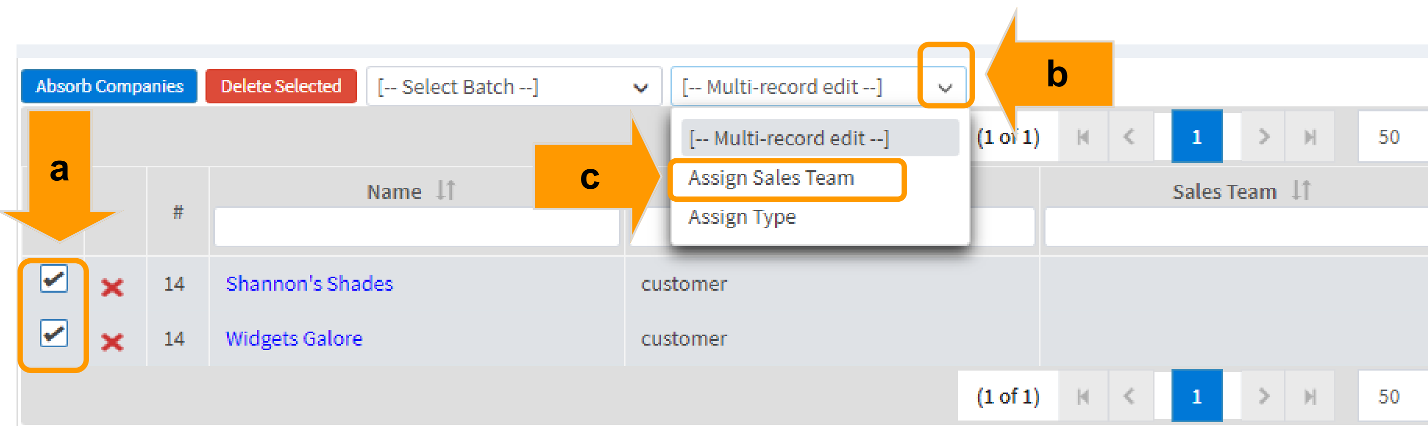
This image shows the edit box and all it's options.

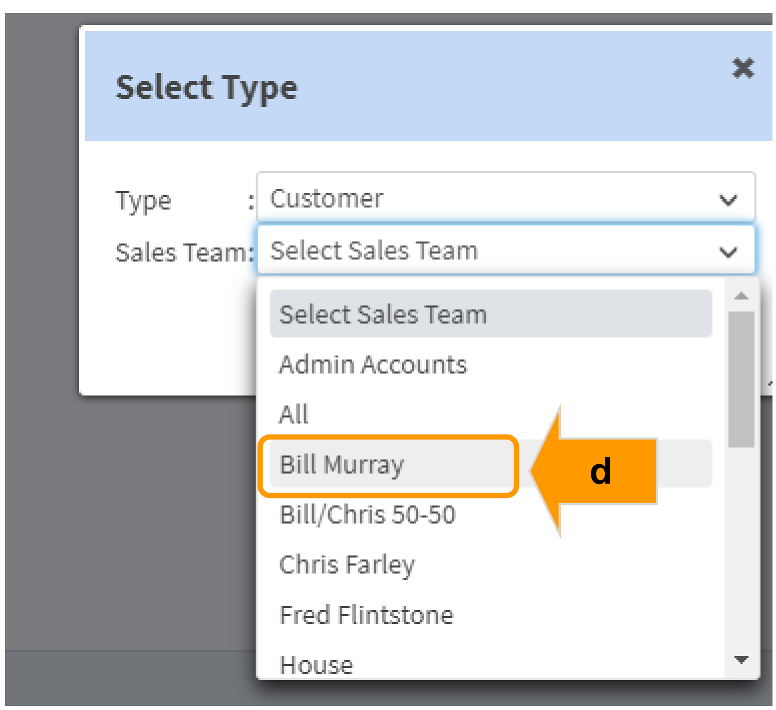


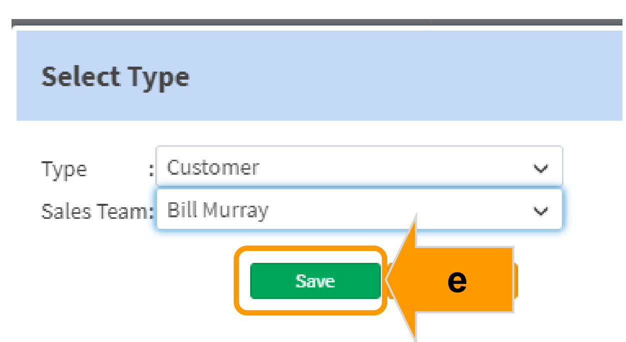
## How to Alias Multiple Companies/Contacts

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



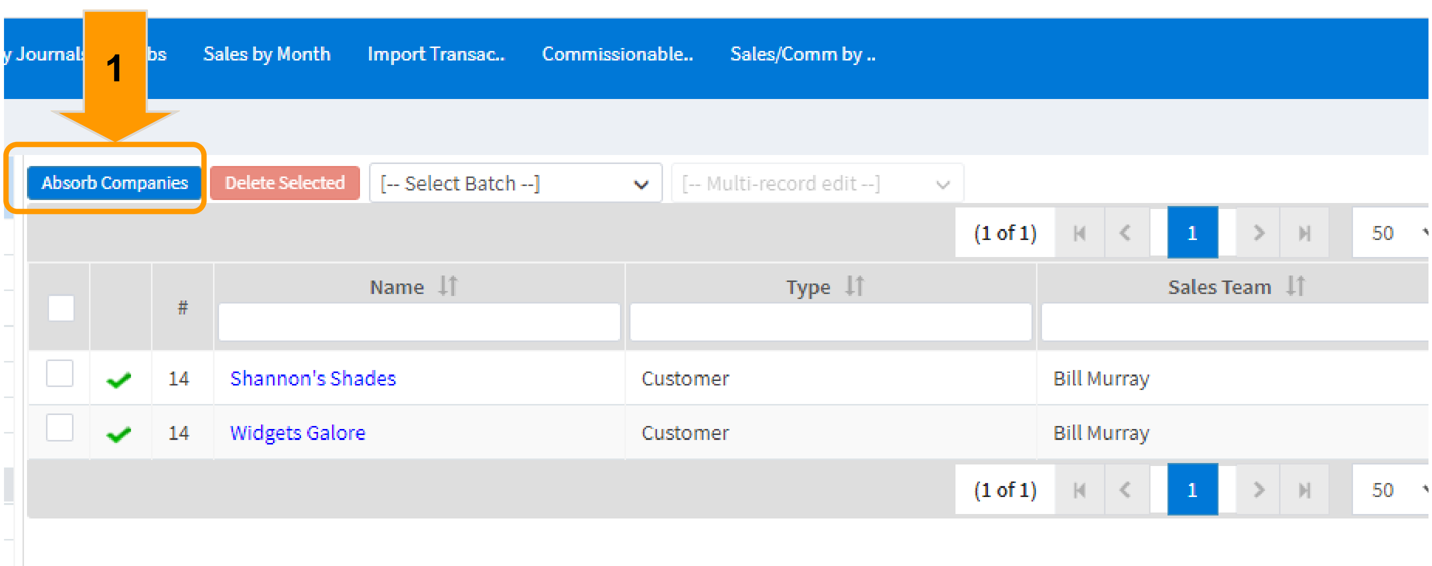



## Absorb Records

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.




**This concludes the instructions for this tutorial.**