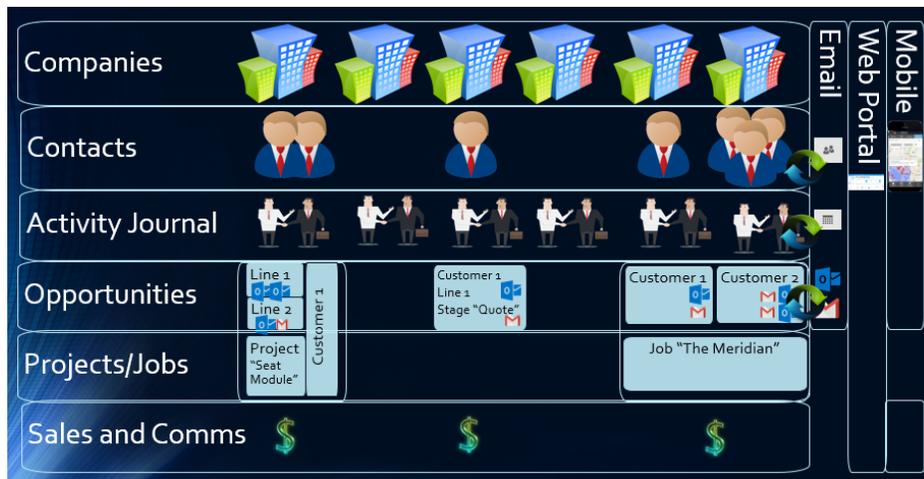


How to Import Product List, Alias & Absorb Records



repfabric®

Connecting the threads of multi-line selling



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Table of Contents

How to set up your Excel file 4
Import CRM Info 4
Find your batch number in Import Log 6
Edit or delete errors 7
How to delete multiple lines at once 8
How to “Absorb Records” 9

Need help?

Email:

Support@repfabric.com

Or call

(844) 737-7253

For videos and more tutorials, log on to:
<https://support.repfabric.com>



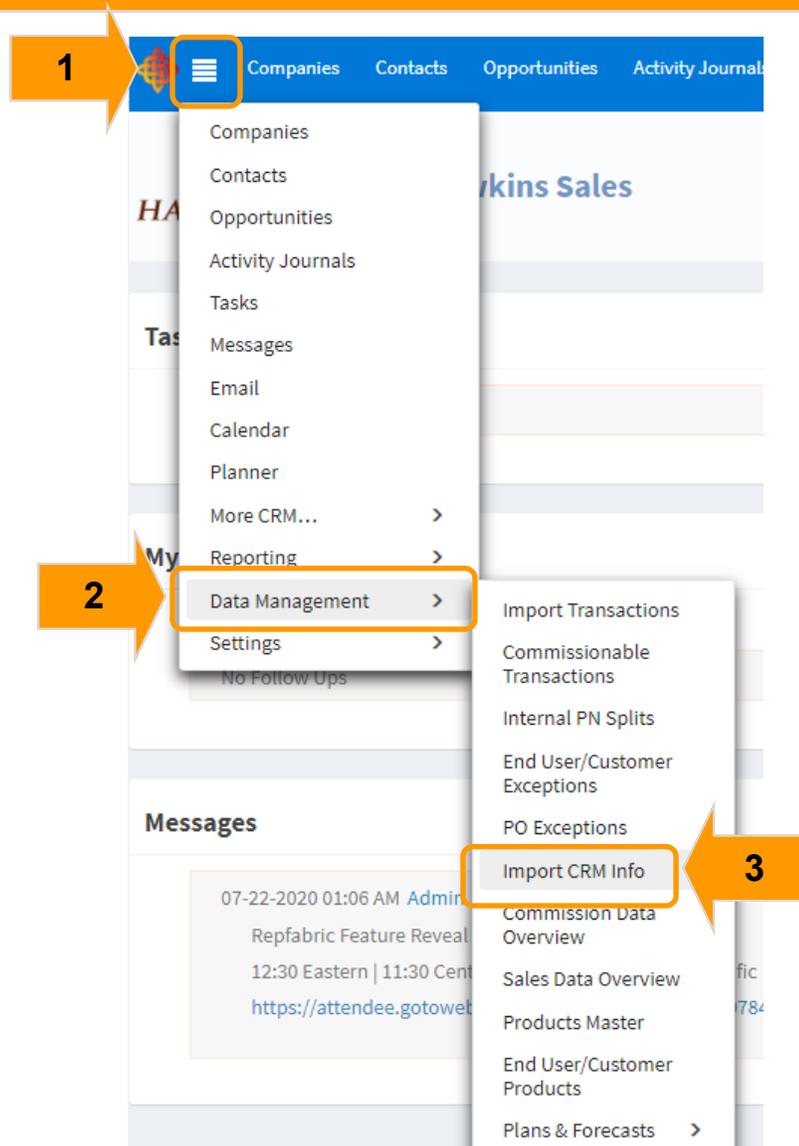


How to Import Product List, Alias & Absorb Records

You can import your own list of products for each of your manufacturers/principals. First you will need to put your data in order. There is a link to a template on this page. Once the spreadsheet is prepared, the import is just a couple clicks. If you have any questions, email Support@Repfabric.com

1. Left click the global menu (four lines, aka hamburger menu).
2. Hover over "Data Management."
3. Left click "Import CRM Info."

This image shows where to find "Import CRM info" in the menu.



[Click here to download a copy of the template](#)

Or copy and paste the row below into Excel

Part Num- ber	Manu- facturer	Product Family	Product Line	Descrip- tion	Root Part Number	Com- mission Rate	Lead Time	UPC	UOM	Wei ght	Cost
---------------------	-------------------	-------------------	-----------------	------------------	------------------------	-------------------------	--------------	-----	-----	------------	------

How to Import Product List (continued...)

4. Left click "Products."
5. Left click "Select File."
6. Navigate to your Excel file.
7. Left click "Open."
8. Left click "Import."

This image shows the "Select file" & "Import" buttons.

The screenshot displays the CRM Import interface. On the left, a sidebar lists various import options, with 'Products' highlighted and labeled with a blue arrow and the number 4. The main area shows the 'Import Products' dialog box. The 'Select File' button is highlighted with a blue arrow and the number 5, and the 'Import' button is highlighted with a blue arrow and the number 8. The dialog includes fields for 'Start in' and 'From row #' and a file list at the bottom showing 'Erico Price File_KK_10-8-2020.xlsx' (92.1 KB).

This image shows an file being selected.

The screenshot shows a Windows File Explorer window titled 'Open'. The address bar indicates the current location is 'This PC > Documents > Product Lists'. The file list shows a single file, 'Erico_Products_Import_KK_10-8-2020.xlsx', which is selected and highlighted with a blue arrow and the number 6. The 'Open' button in the bottom right corner is highlighted with a blue arrow and the number 7.



How to Import Product List (continued...)

9. Left click "Import Log" to find out "Batch number" for your import.
10. Make a note of your "Batch Number."
11. Left click "Alias Products."

These images show how to find your batch number.

CRM Import

Data Import

Import Log **9**

Contacts (Fixed Format)

Contacts (Outlook Format)

Companies

Opportunities

Products

Alias Contacts

Alias Companies

Alias Opportunities

Alias Products

Import Products ?

Header row # : 1

Start import from row # : 2

Select a csv/xls/xlsx file to import :

Load Process Status

Total processed: 1994 Total loaded : 1994

Row #	Error
No errors	

CRM Import

Data Import

Import Log

Contacts (Fixed Format)

Contacts (Outlook Format)

Companies

Opportunities

Products

Alias Contacts

Alias Companies

Alias Opportunities

Alias Products **11**

Import Log

Batch #	Filename	Type
29	Erico_Products_Import_KK_8-2020.xlsx	Products
26	Maxlite_04-08.xlsx	Products
25	Cree Hawkins Territory pricing.xlsx	Products
19	Nick Pecot Contact Load 1-	Contacts (Fixed)

How to Import Product List (continued...)

12. Use the drop-down to select your batch.
13. You can use the blue edit pencil on the left to edit
14. Or use the trash can to delete

See next page to use check boxes to delete multiple line items at the same time.

This image shows how to navigate to your batch.

The screenshot shows the CRM Import interface. At the top, there is a navigation menu with items: Companies, Contacts, Opportunities, Activity Journals, Tasks, Quotes, Samples, Projects, Jobs, and Sales by. Below this is a 'Data Import' section with buttons for 'Absorb Products' and 'Delete Selected'. A dropdown menu is open, showing options: '-- Select Batch --', Batch 25, Batch 26, and Batch 29. An orange arrow labeled '12' points to the dropdown menu.

This image shows the "edit" and "delete" buttons.

The screenshot shows a table of product lines. The table has columns: Product Line, Product Description, Product Price, Commission Rate, and Error Msg. The table contains five rows of data. In the rightmost column, there are two columns of icons: a blue pencil icon (edit) and a red trash can icon (delete). An orange arrow labeled '13' points to the edit icon for the second row. Another orange arrow labeled '14' points to the delete icon for the fourth row.

Product Line	Product Description	Product Price	Commission Rate	Error Msg
	ERICO CADWELD Welding Material, F20	0.0	0.0	Part Number: Duplicate;
	Handle Clamp, C, E, Q, R Price Key	0.0	0.0	Part Number: Duplicate;
	Heavy Duty, Offset Mounting Bracket, SS	0.0	0.0	Part Number: Duplicate;
	PV Type 1, 1000VDC	0.0	0.0	Part Number and Principal: Duplicate;
	PV TYPE 1, 1500VDC	0.0	0.0	Part Number and Principal: Duplicate;



How to Import Product List (continued...)

To delete multiple lines at once:

1. Place a check mark next to desired lines.
2. Left click the "Delete Selected."

This image shows multiple selections to be deleted.

Absorb Products										Batch 29		[- Multi-record edit -]		Tutorials		Create			
(1 of 40)										1		2		3		4		5	
	#	Part No. ↑↓	Manufacturer ↑↓	Product Family ↑↓	Product Line ↑↓	Product Description ↑↓	Product Price ↑↓	Commission Rate ↑↓	Error Msg ↑↓										
<input type="checkbox"/>	29	200	Erico			ERICO CADWELD Welding Material, F20	0.0	0.0	Part Number: Duplicate;	<input type="checkbox"/>	<input type="checkbox"/>								
<input type="checkbox"/>	29	L160	Erico			Handle Clamp, C, E, Q, R Price Key	0.0	0.0	Part Number: Duplicate;	<input type="checkbox"/>	<input type="checkbox"/>								
<input type="checkbox"/>	29	7000250S4	Erico			Heavy Duty, Offset Mounting Bracket, SS	0.0	0.0	Part Number: Duplicate;	<input type="checkbox"/>	<input type="checkbox"/>								
<input checked="" type="checkbox"/>	29	PVT11000R	Erico			PV Type 1, 1000VDC	0.0	0.0	Part Number and Principal:Duplicate;	<input type="checkbox"/>	<input type="checkbox"/>								
<input checked="" type="checkbox"/>	29	PVT11500R	Erico			PV TYPE 1, 1500VDC	0.0	0.0	Part Number and Principal:Duplicate;	<input type="checkbox"/>	<input type="checkbox"/>								
<input checked="" type="checkbox"/>	29	PVT1500M	Erico			PV Module, 500VDC	0.0	0.0	Part Number and Principal:Duplicate;	<input type="checkbox"/>	<input type="checkbox"/>								
<input checked="" type="checkbox"/>	29	PVT1500SM	Erico			PV T1 SIDE MODULE, 500 VDC	0.0	0.0	Part Number and Principal:Duplicate;	<input type="checkbox"/>	<input type="checkbox"/>								
<input checked="" type="checkbox"/>	29	PVT1750M	Erico			PV MODULE, 750VDC	0.0	0.0	Part Number and Principal:Duplicate;	<input type="checkbox"/>	<input type="checkbox"/>								

CRM Import

Data Import

Import Log

Contacts (Fixed Format)

Contacts (Outlook Format)

Companies

Absorb Products

Delete Selected

Part No.

