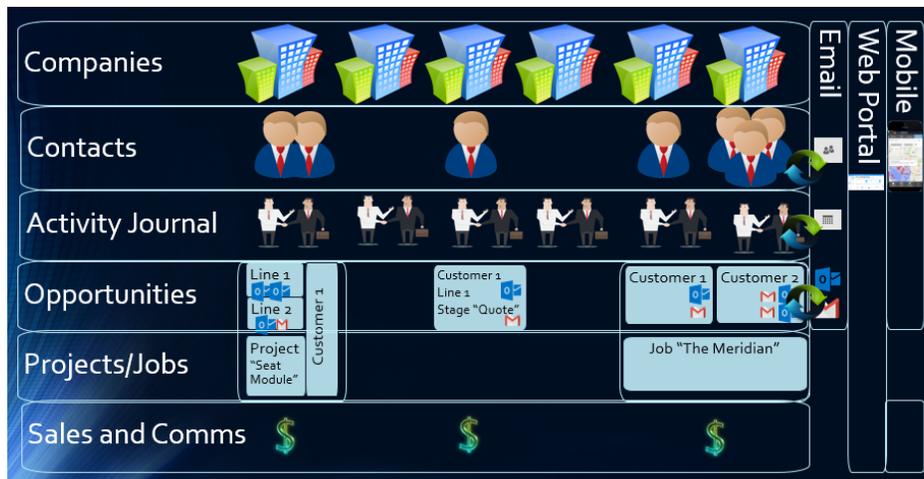


How to Use Re-Import to Update Company and Contact Records in Bulk



repfabric®

Connecting the threads of multi-line selling



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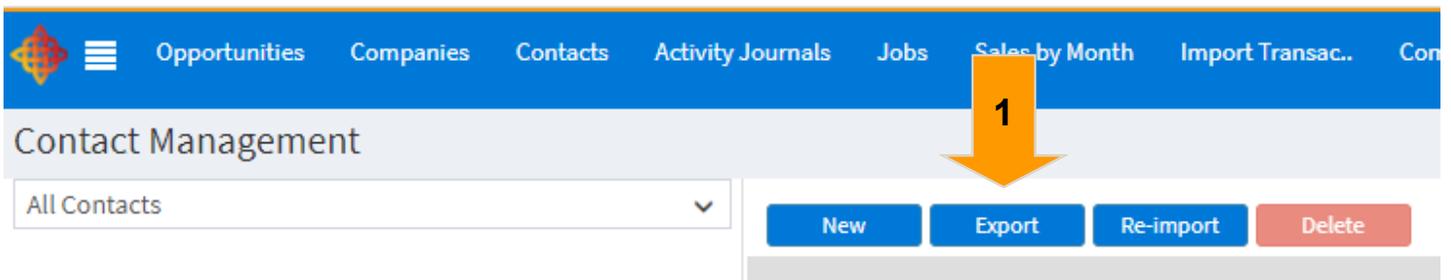
How to Use Re-Import to Update Company and Contact Records in Bulk

You can now make bulk updates to a group of Company or Contact records. You will first need to export the list of companies/contacts that you want to change. Then you will make the changes in the Excel sheet and re-import the updated information.

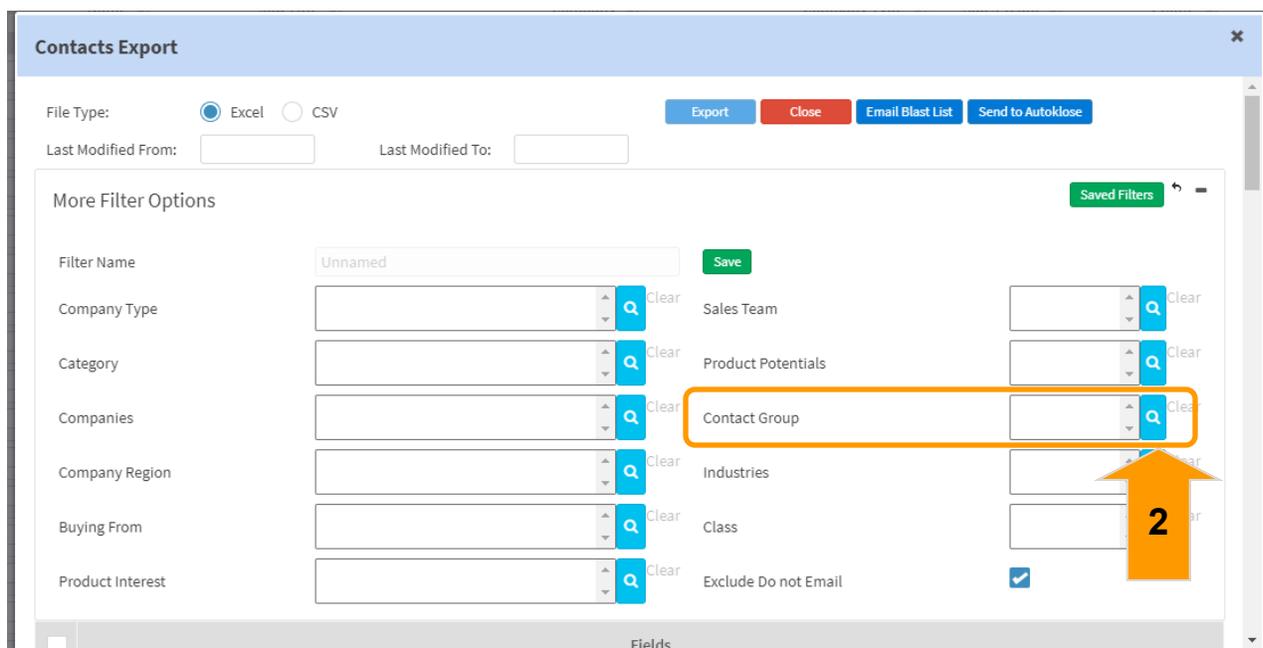
If you want to remove something from a field, just delete it and leave that field blank. When you re-import, it will make that field blank in Repfabric.

We will show this example in Contacts, but it is the same in Companies. We are going to export a list by “Contact Group.” I want to re-name “Showroom” to “Virtual Showroom” (You will have to create the new Contact Group in “Subtables” for “Virtual Showroom” first).

1. Left click “Export” button.
2. Use the magnifier to choose the filters for your export.



This image shows we are going to use “Contact Group” to select our contacts to export.



How to use Re-import to Update Company/Contact Records (continued...)

3. Scroll down and put a check mark to the left of “Fields” (this will check ALL columns).
4. Scroll back to the top and click “Export” button.

This image shows where you will check next to “Fields.”

The screenshot shows the 'Contacts Export' dialog box. The 'Fields' section is highlighted with an orange box and an arrow labeled '3'. The 'Fields' section contains a list of fields with checkboxes: First Name, Last Name, Full Name, and Company Type. The 'Exclude Do not Email' checkbox is also checked.

This image shows where you will click “Export” button.

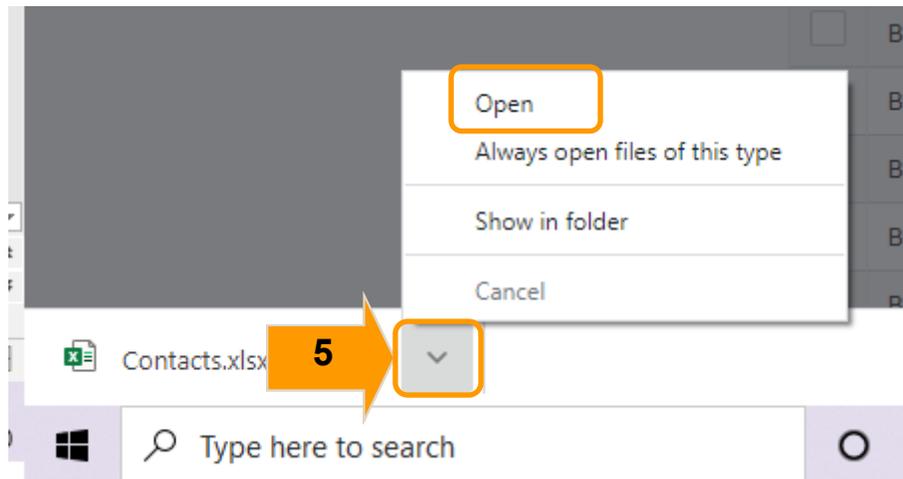
The screenshot shows the 'Contacts Export' dialog box. The 'Export' button is highlighted with an orange box and an arrow labeled '4'. The 'Export' button is located in the top right corner of the dialog box. The 'File Type' is set to 'Excel'. The 'Last Modified From' and 'Last Modified To' fields are empty. The 'More Filter Options' section is visible below the 'Export' button.



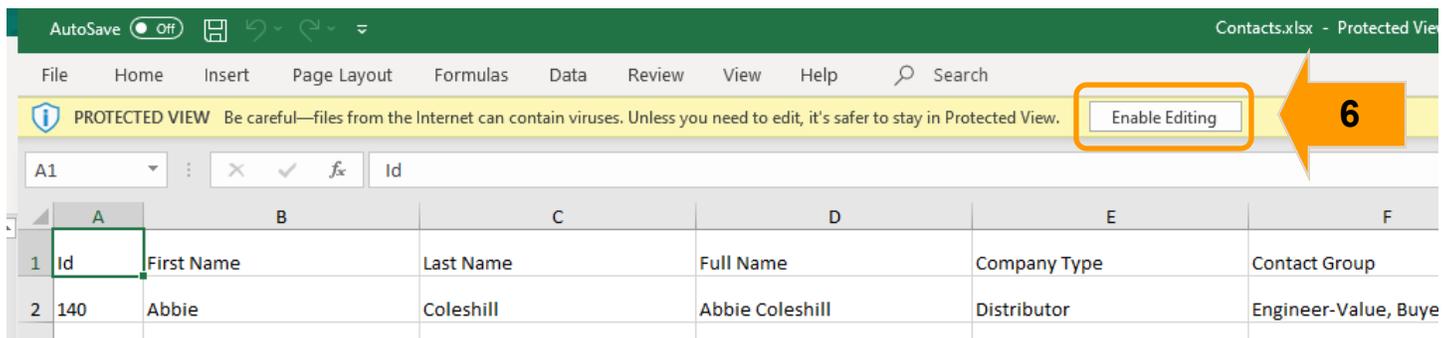
How to use Re-import to Update Company/Contact Records (continued...)

5. Open your downloaded file.
6. Left click "Enable Editing."

This image shows the downloaded file to open.



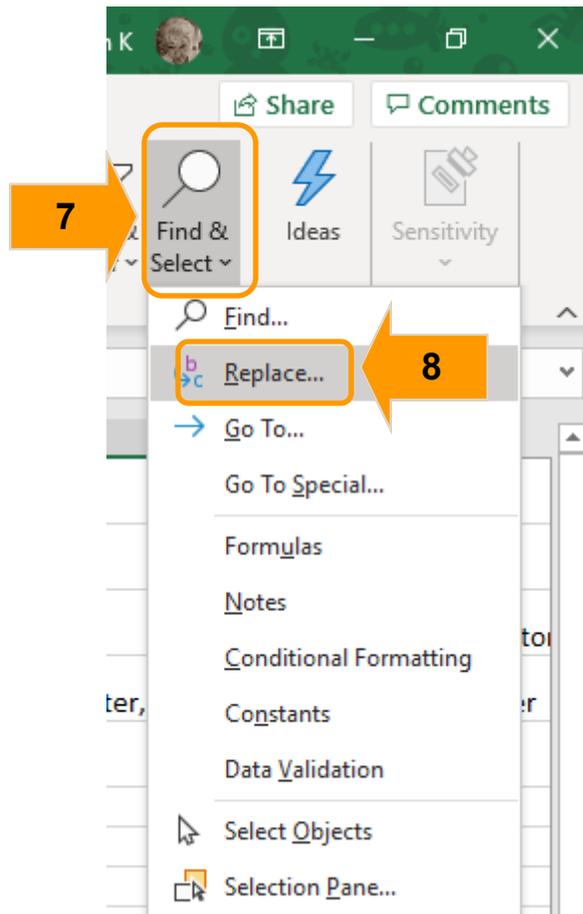
This image shows where to "Enable Editing."



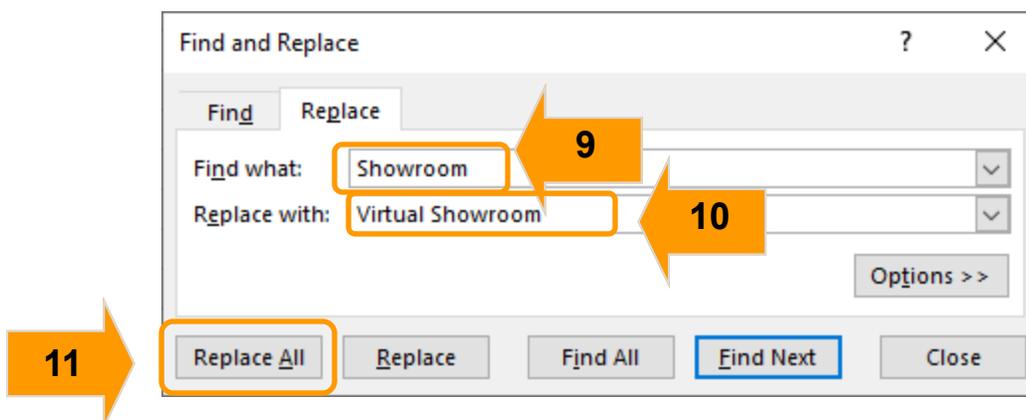
How to use Re-import to Update Company/Contact Records (continued...)

7. Left click “Find & Select” button in top right corner of Excel.
8. Left click “Replace.”
9. Type in the word you want to replace.
10. Type in the new word.
11. Left click “Replace All.”

This image shows where to find “Find & Replace” button.



This image shows where we will type in the word to find and the replacement word.





How to use Re-import to Update Company/Contact Records (continued...)

If you want to clear out a field in Repfabric, just blank out that field in your Excel file.

In this example we have removed all the text from F5. There aren't ANY contact groups listed for Shannon Kauffman. This will make the "Contact Group" field blank when we re-import.

SAVE YOUR NEW FILE WITH A NEW NAME

This image shows the before and after when re-importing a blank field.

	A	B	C	D	E	
1	Id	First Name	Last Name	Full Name	Company Type	Contact Group
2	140	Abbie	Coleshill	Abbie Coleshill	Distributor	Engineer-Value, Buyer, Inside Sales, Outside Sales, Virtual
3	247	Kyle	Hammond	Kyle Hammond	Distributor	Buyer, Inside Sales, Virtual Virtual Showroom, Newsletter
4	177	Tim	Jans	Tim Jans	CEM	Engineer-Mechanical, Engineer-Electrical, Engineer-Value, I
5	175	Shannon	Kauffman	Shannon Kauffman	Customer	Buyer, Virtual Showroom, Newsletter
6						

	D	E	F
	Full Name	Company Type	Contact Group
	Abbie Coleshill	Distributor	Engineer-Value, Buyer, Inside Sales, Outside Sales, Virtual Showroom, Unsubscribed, Newsletter, Engineer-Quality
	Kyle Hammond	Distributor	Buyer, Inside Sales, Virtual Virtual Showroom, Newsletter
	Tim Jans	CEM	Engineer-Mechanical, Engineer-Electrical, Engineer-Value, Buyer, Inside Sales, Outside Sales, Virtual Showroom, Unsubscribed, Newsletter, Engi
	Shannon Kauffman	Customer	

Re-import feature allows you to bulk update Contacts from spreadsheets of .xlsx file format. Users are expected to export the records using the Export option, make updates to the necessary fields and then use the same spreadsheet to bulk update the contacts.

Guidelines

- Id column is mandatory. The spreadsheet will not be processed further if the column Id is not provided in the first column
- Date and time fields must be in **MM-dd-yyyy hh:mm** a date format
- Date time fields must be in **America/New_York** time zone
- Fields applicable for contact update - First Name, Last Name, Contact Group, Job Title, Company, Department, Manager, Assistant, Home Phone, Business Phone, Mobile, Alternate Phone, Fax, Personal Email, Business Email 1, Business Email 2, Region, Referred By, Context, Notes, Street, City, State, Zip code, Company ID, Contact Ref. No., Business PO Box, Home PO Box, Product Interest, Do not Email, Primary, Custom Fields
- Multi-select fields like Contact Groups and Product Interests can be combined into comma separated fields
- 'Do not Email' and 'Primary': Blank data in these fields is considered as No
- 'Last Modified Date' and 'Last Modified User' are updated as date of re-import and logged in user.
- Custom Fields are not handled at the moment

How to Re-import the updated Excel File

Now that you have your file saved you can re-import your changes.

1. Left click “Re-import” button in Contacts screen.
2. Left click “Select File.”

This image shows the “Re-import” button in “Contacts” screen.

The screenshot shows the 'Contact Management' interface. The top navigation bar includes 'Opportunities', 'Companies', 'Contacts', 'Activity Journals', 'Jobs', 'Sales by Month', 'Import Transac..', and 'Comm'. Below the navigation bar, there is a 'Contact Management' header and a dropdown menu set to 'All Contacts'. To the right of the dropdown are four buttons: 'New', 'Export', 'Re-import', and 'Delete'. The 'Re-import' button is highlighted with a yellow box, and a yellow arrow labeled '1' points to it. Below the buttons is a table with columns for 'Name' and 'Job Title'. The first row shows 'Abbie Colehill' and 'GM'.

The screenshot shows the 'Re-import Contacts' dialog box. The title bar is 'Re-import Contacts' with a close button. The main content area contains the following text:

Re-import feature allows you to bulk update Contacts from spreadsheets of .xlsx file format. Users are expected to export the records using the Export option, make updates to the necessary fields and then use the same spreadsheet to bulk update the contacts.

Guidelines

- Id column is mandatory. The spreadsheet will not be processed further if the column Id is not provided in the first column
- Date and time fields must be in **MM-dd-yyyy hh:mm a** date format
- Date time fields must be in **America/New_York** time zone
- Fields applicable for contact update - First Name, Last Name, Contact Group, Job Title, Company, Department, Manager, Assistant, Home Phone, Business Phone, Mobile, Alternate Phone, Fax, Personal Email, Business Email 1, Business Email 2, Region, Referred By, Context, Notes, Street, City, State, Zip code, Company ID, Contact Ref. No., Business PO Box, Home PO Box, Product Interest, Do not Email, Primary, Custom Fields
- Multiple fields like Contact Groups and Product Interests can be combined into comma separated fields
- 'Do not Email' and 'Primary': Blank data in these fields is considered as No
- 'Last Modified Date' and 'Last Modified User' are updated as date of re-import and logged in user.
- Contact Groups are not handled at the moment

At the bottom of the dialog box, there are three buttons: '+ Select File', 'Re-import', and 'Cancel'. The '+ Select File' button is highlighted with a yellow box, and a yellow arrow labeled '2' points to it.



How to use Re-import to Update Company/Contact Records (continued...)

3. Locate and select your saved file.
4. Left click “Open.”
5. Left click “Re-import” button.

This image shows

The image shows a file explorer window titled "Open" with the path: repfabric > Data - Instances > _Learning.Repfabric >. The file list includes:

- Reimport_Contacts_new_ContactGroup_KK_10-8-2020.xlsx
- TroubleShoot_Outlook_Addin.png
- Repfabric Mapping Practice Sheet PDF to Print.pdf
- 301B Sales & Commission Reports grid.pdf
- Reports - CommissionReportVisibility.png

An orange arrow labeled "3" points to the selected file. A second orange arrow labeled "4" points to the "Open" button in the file explorer's bottom right corner.

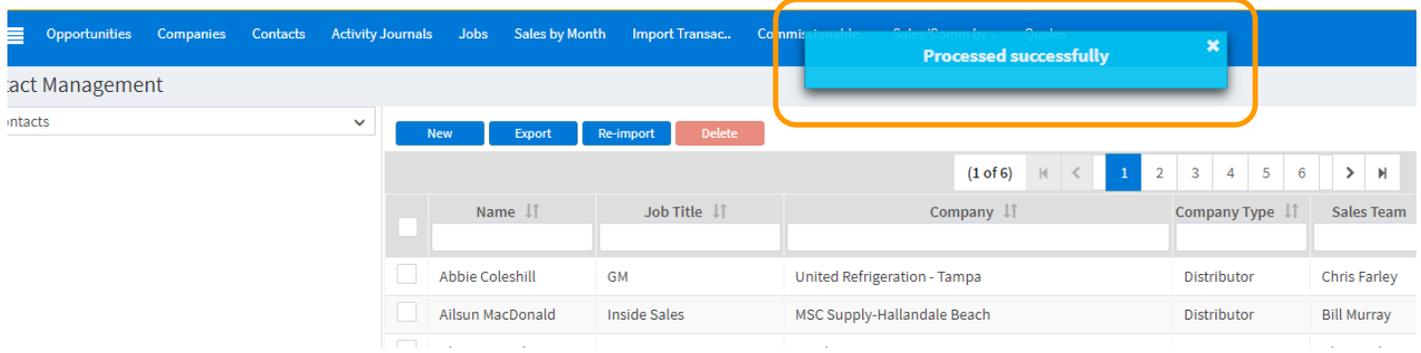
Below the file explorer, a dialog box is shown with "All Files (*.*)" selected in the file type dropdown. An orange arrow labeled "5" points to the "Re-import" button in the dialog box's action bar.

- 'Do not Email' and 'Primary' link data in these fields is considered as No
- 'Last Modified Date' and 'Modified User' are updated as date of re-import and logged in user.
- Custom Fields are not handled at the moment

The dialog box shows the selected file: Reimport_Contacts_new_ContactGroup_KK_10-8-2020.xlsx (18.6 KB).

How to use Re-import to Update Company/Contact Records (continued...)

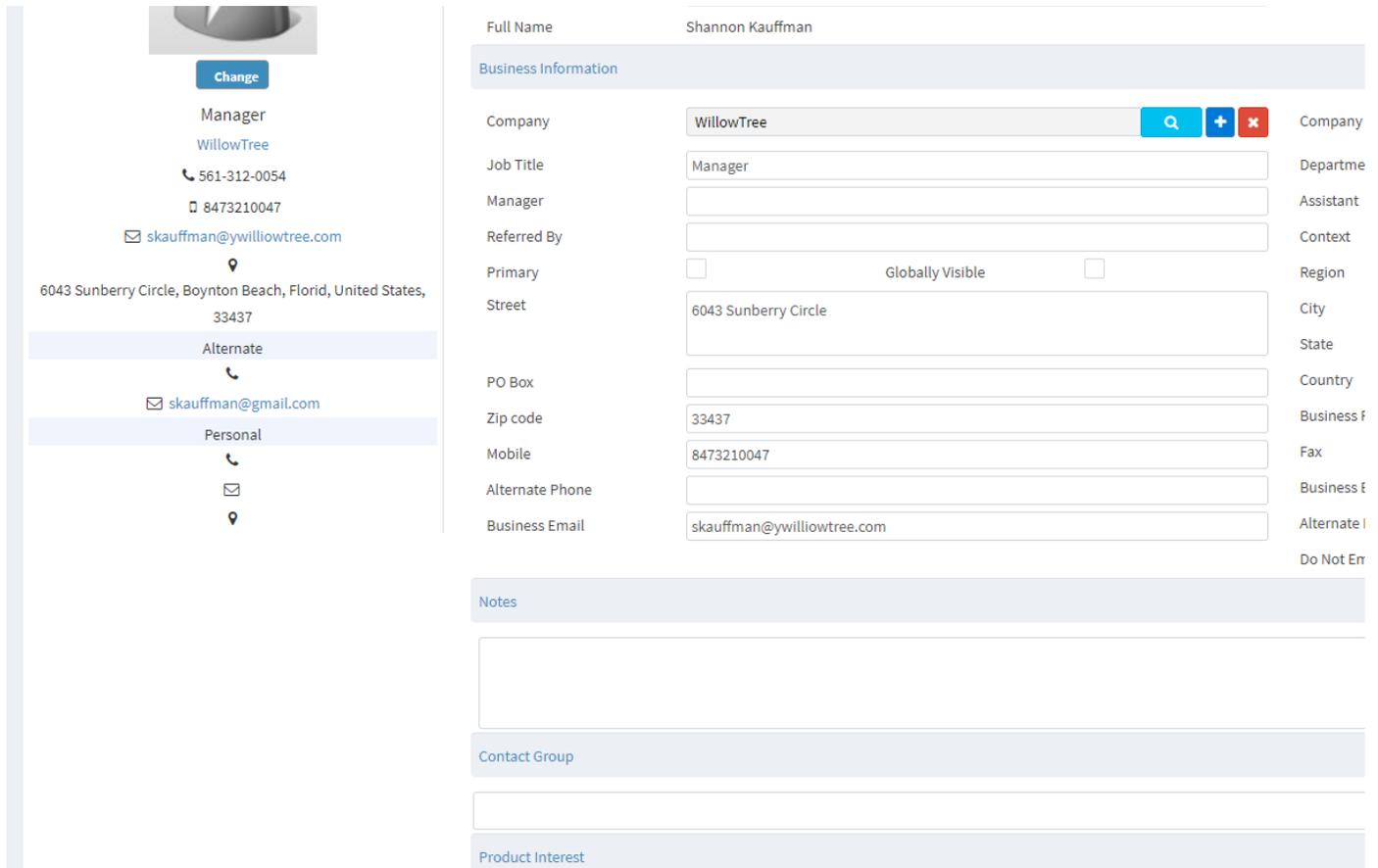
You should see “Processed successfully” when the re-import is complete.



The screenshot shows a CRM interface with a blue navigation bar at the top containing menu items: Opportunities, Companies, Contacts, Activity Journals, Jobs, Sales by Month, Import Transac..., Commission Manag..., Sales/Comm..., and Out... A blue notification box with the text "Processed successfully" and a close icon is overlaid on the "Re-import" button. Below the notification, there are buttons for "New", "Export", "Re-import", and "Delete". A table of contacts is visible, with the following data:

	Name ↑↓	Job Title ↑↓	Company ↑↓	Company Type ↑↓	Sales Team
<input type="checkbox"/>	Abbie Coleshill	GM	United Refrigeration - Tampa	Distributor	Chris Farley
<input type="checkbox"/>	Ailsun MacDonald	Inside Sales	MSC Supply-Hallandale Beach	Distributor	Bill Murray

This image shows that the “Contact Group” field is now blank and updates have been made.



The screenshot shows a contact profile for Shannon Kauffman. The profile includes a photo placeholder, a "Change" button, and contact information for WillowTree. The business information section is expanded, showing the following details:

- Full Name: Shannon Kauffman
- Business Information:
 - Company: WillowTree
 - Job Title: Manager
 - Manager: [Blank]
 - Referred By: [Blank]
 - Primary: Globally Visible
 - Street: 6043 Sunberry Circle
 - PO Box: [Blank]
 - Zip code: 33437
 - Mobile: 8473210047
 - Alternate Phone: [Blank]
 - Business Email: skauffman@williowtree.com
- Notes: [Blank]
- Contact Group: [Blank]
- Product Interest: [Blank]



This concludes the instructions for this tutorial.