



SprinxCRM

How to import company or person from XLS

General import rules

1. Do not delete (or move) any column in an import file. Keep column order as is in a template file.
2. Name of country has to be same as is in SprinxCRM (see any contact record). Otherwise default country will be used to import.
3. Name of region has to be same as is in SprinxCRM (see any contact record). Otherwise import will leave this empty.
4. Keep proper record order within import file. You have to insert company record first and then person record. Otherwise person will be imported without link to the company.
5. Non valid records will be discarded from import and the data will not appear in the SprinxCRM. The import program will report as successful even there are discarded records within an import file.
6. To have valid records you have to keep mandatory fields (Company, Corporate name, Last name, First name) correct according to rules for mandatory fields (see table Rules for mandatory fields below).
7. You can fill optional fields or leave them empty (see Person optional fields or Company optional fields below).

What contacts can I import into SprinxCRM from XLS template?

Using contact import form XLS you can perform following actions:

- To create a new person,
- To create a new company,
- To create a new person and link it to already existing company in SprinxCRM,
- To create a new company and a new person and to create a link between them.

The action, that will be performed by import program depends whether the fields: Last name, Corporate name and Company are filled by data or not. The rules are described in the table below how to fill data into the fields.

Table: Rules for mandatory fields.

What has to be filed and left empty in order to perform the import action?

Action to create:	Field name in an import template file			
	<i>Company</i>	<i>Corporate name</i>	<i>Last name</i>	<i>First name</i>
<i>a new person</i>	Empty	Empty	Filled	Optional
<i>a new company</i>	Filled	Optional	Empty	Empty
<i>a new person and link it to already existing company</i>	Filled	Empty	Filled	Optional
<i>a new company and a new person and to create a link between them.¹</i>	Filled	Optional	Empty	Empty
	Filled	Empty	Filled	Optional

¹ This consists from two separate rows in the import file. First row has to be a company and second row has to be a person.

Company optional fields

The import data from the following optional fields will be imported when importing Company record.

Tax ID, Other ID, Phone office, Fax office, Email office, www, Note, Territory, Street, Zip, City, Country, Street business, ZIP code business, City business, Country business.

Person optional fields

The import data from the following optional fields will be imported when importing Company record.

- Optional fields for a new person (without link to a company):

Title before, Title after, Salutation, Sex, Phone private, Phone mobile, Fax private, Email office, Email private, www, Note, Street, Zip, City, Country.

- Optional fields for a new person to be linked to an existing company:

Title before, Title after, Position, Salutation, Sex, Phone Office, Phone private, Phone mobile, Fax private, Fax office, Email office, Email private, www, Note, Street, Zip, City, Country.